DOCUMENT RESUME

ED 408 419 CE 073 588

AUTHOR	Carman, Priscilla S.
TITLE	Professional Development Capacity Building in Pennsylvania's Regional Staff Development Program: The "WorkNet" Project. Final Report [and] WorkNet Workplace Literacy Trainer's Guide.
INSTITUTION	Pennsylvania State Univ., University Park. Inst. for the Study of Adult Literacy.
SPONS AGENCY	Pennsylvania State Dept. of Education, Harrisburg. Bureau of Adult Basic and Literacy Education.
PUB DATE	95
NOTE	242p.
CONTRACT	99-5036
PUB TYPE	Guides - Non-Classroom (055) -- Reports - Descriptive (141) -- Tests/Questionnaires (160)
EDRS PRICE	MF01/PC10 Plus Postage.
DESCRIPTORS	Adult Basic Education; *Adult Educators; Adult Literacy; Basic Skills; Curriculum Development; Inservice Teacher Education; Instructional Materials; Job Skills; *Literacy Education; Material Development; Program Development; Program Evaluation; School Business Relationship; *Staff Development; Student Evaluation; Teaching Guides; *Technical Assistance; Trainers; *Workplace Literacy
IDENTIFIERS	353 Project

ABSTRACT

These two documents are products of a project to improve the capability of the Pennsylvania Regional Staff Development Centers to provide current, research-based workplace literacy training and technical assistance to adult basic and literacy education programs. The final report describes these project activities: development of training materials for participants to use in staff development activities; development of resource databases; provision and evaluation of two 5-hour train-the-trainer sessions; and technical assistance. Appendices composing over half the report contain the following: the needs assessment, participants' resource notebook materials, correspondence, project newsletter, meeting agendas, surveys, evaluations, and press release. The second document is a trainer's guide for anyone who provides training, information, or technical assistance to workplace literacy providers. An overview illustrates the need for workplace literacy programs. Section 2 addresses how and why providers must market their services to the business community and funding options to support programs. Section 3 discusses building and maintaining effective partnerships and tips for working with businesses and unions. Section 4 focuses on curriculum options, recruitment, learner assessment, and program evaluation. Sections 1-4 are divided into two or three topics. For each topic, these components are included: background reading, resource materials list, training ideas, suggested in-depth readings, overhead transparency masters, and worksheets. Section 5 is a glossary. Section 6 contains lists of newsletters, resource organizations, electronic resources, curriculum resources, resource persons and includes an extensive bibliography. (YLB)

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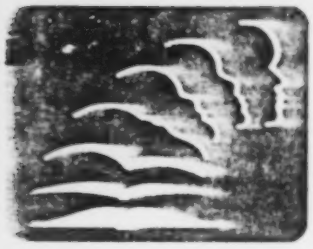

INSTITUTE
FOR THE STUDY
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LITERACY

Professional Development Capacity Building in Pennsylvania's Regional Staff Development Program: The *WorkNet* Project

FINAL REPORT

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Professional Development Capacity Building
in Pennsylvania's
Regional Staff Development Program:
The *WorkNet* Project

FINAL REPORT

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Fiscal Year: 1994-1995

Contract #: 99-5036

Federal Project Cost: $33,385

The activity which is the subject of this report was supported in whole or part by the U.S. Department of Education. However, the opinions expressed herein do not necessarily reflect the position or policy of the U. S. Department of Education or the Pennsylvania Department of Education, and no official endorsement by these agencies should be inferred.

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ABSTRACT

Title: Professional Development Capacity Building in Pennsylvania's Regional Staff Development Programs: The *WorkNet* Project

Project #: 99-5036 **Funding:** $33,385

Project Director: Dr. Eunice N. Askov **Phone #:** 814-863-3777

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Purpose: The purpose of this project was to improve the capability of each Regional Staff Development Center to provide current, research-based workplace literacy training and technical assistance to ABLE programs in that region and to expand and coordinate the statewide workplace literacy network.

Procedures: The *WorkNet* project staff: 1) developed research-based training materials (a resource notebook and trainer's guide) for participants to use in offering staff development activities; 2) developed resource databases; 3) provided and evaluated two five-hour train–the–trainer sessions at the Penn State University Scanticon Conference Center; 4) provided technical assistance throughout the project; and 5) evaluated and disseminated the project findings.

Summary of Findings: The project was highly rated by the 17 project participants and was effective in meeting all its goals. The resource materials and databases were useful and timely and participants used them for marketing, curriculum development, and program planning during and after the project. The training sessions also were highly effective and participants said they looked forward to continuing the project in some way in the future.

Comments: This project was successful in expanding and furthering the coordination of Pennsylvania's workplace literacy network. In addition to the project staff and participants, numerous individuals from around the state agreed to be part of the workplace literacy resource person database. However, lack of financial support and staffing concerns are very real issues if project participants are expected to provide in-depth training and technical assistance in the future.

Products: In addition to this final report, the *WorkNet* project staff developed a resource notebook and trainer's guide which includes an extensive section of resources (newsletters, organizations, electronic resources, bibliography, instructional materials, and resource persons). The *WorkNet* products may be used by anyone who provides information, technical assistance, or training to workplace literacy providers.

Professional Development Capacity Building in

Pennsylvania's Regional Staff Development Programs:

The *WorkNet* Project

INTRODUCTION

Rationale and Background

The type and content of Pennsylvania's staff development activities are determined by the expressed needs of local programs. In most instances, this approach is effective; however, some staff development efforts would benefit from a more centralized approach. For example, workplace literacy programs have changed dramatically in the past five years. Projects supported by the U.S. Department of Education's National Workplace Literacy Program have identified best practices as well as model curricula, assessments, and evaluation procedures. The National Workforce Assistance Collaborative (funded by the U.S. Department of Labor to the National Alliance of Business) has developed current, research-based workplace literacy resource materials and information. Section 353 Special Demonstration projects in Pennsylvania and other states also have produced research findings and products related to workplace education. Unfortunately, local or regional trainers may be unaware of or not have ready access to these findings and materials, limiting the timeliness and effectiveness of staff development efforts.

The Institute for the Study of Adult Literacy met this staff training need with the *WorkNet* project. The project staff conducted a pre-project needs assessment (see Appendix A) and site visits to identify regional training needs, researched and designed training materials and resources, and conducted workplace literacy training sessions. Using a "train-the-trainer" model, the *WorkNet* project prepared 17 regional trainers (see Appendix B) to provide technical assistance and training to adult basic and literacy education (ABLE) providers in their region. In addition to this final report, the *WorkNet*

project staff developed a resource notebook and a trainer's guide which includes extensive resource databases.

Purpose

The purpose of this project was to improve the capability of each Regional Staff Development Center to provide current, research-based workplace literacy training and technical assistance to ABLE programs in that region and to expand and coordinate the statewide workplace literacy provider network.

Time Frame

The project staff conducted the project from September 1, 1994 through June 30, 1995. During the first half of the project period, the *WorkNet* staff: 1) made site visits to the nine Regional Staff Development Centers to meet with project participants and identify training needs; 2) researched and developed the training materials and resource databases; and 3) planned and conducted the first training session. Activities conducted in the second half of the project period included: 1) planning and conducting the second training session; 2) revising the training materials and databases; 3) evaluating the project; 4) providing follow-up technical assistance; and 5) writing the final report and disseminating project information.

Project Staff and Key Personnel

Dr. Eunice N. Askov, Project Director, oversaw all project activities, including the development of the training materials, evaluation forms, needs assessments, reports, and training session agendas; Dr. Askov also conducted the second training session. *Priscilla Carman*, Project Coordinator, conducted the daily project activities, made the site visits, researched and developed the training and evaluation materials and databases, provided technical assistance, wrote the final report, and disseminated project information. *Barbara Van Horn*, Project Associate, conducted the initial training needs

assessment and assisted with developing the training session agendas and the resource databases. *Shawn Jenkins*, Graduate Assistant, assisted Ms. Carman with the development of the training materials and databases and also compiled the evaluation data.

Audience

The target population for the training sessions and technical assistance were the 17 project participants representing the nine Regional Staff Development Centers. The target population for the final products of the project (final report, trainer's guide, resource notebook, and resource databases) are the project participants, Regional Staff Development Centers, and ABLE providers who wish to know more about workplace literacy programs and resources.

Source of Dissemination

Copies of this final report and the *WorkNet* products (trainer's guide and resource notebook) may be obtained from:

AdvancE Literacy Resource Center
333 Market Street, 11th Floor
Harrisburg, PA 17126-0333
800-992-2283 or 717-783-9192
FAX: 717-783-5420

Western PA Adult Literacy Resource Center
5347 William Flynn Hwy, Route 8
Gibsonia, PA 15044-9644
800-446-5607 x216 or 412-961-0294 x216
FAX: 412-443-1310

or

Institute for Study of Adult Literacy
Attention: Priscilla Carman
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University Park, PA 16801
814-863-3777
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PA Department of Education
Bureau of Adult Basic & Literacy Education
333 Market Street
Harrisburg, PA 17126-0333
717-787-5532
FAX: 717-783-5420

OBJECTIVES

The specific objectives of this project were to:

1. Develop research-based training materials that trainers can use in offering staff development activities to practitioners.
2. Develop and maintain centralized databases on resource/instructional materials and Pennsylvania workplace literacy trainers.
3. Provide train-the-trainer sessions.
4. Provide follow-up technical assistance throughout the project.

PROCEDURES

1. *Develop research-based training materials that trainers can use in offering staff development activities to practitioners.*

To develop the resource notebook (entitled, *WorkNet: Workplace Literacy Resource Notebook*), the project staff researched current materials and information from the National Workplace Literacy Program, the National Workforce Assistance Collaborative (NWAC), journal articles, national listservs, 353 abstracts, recommendations from providers, and national and state newsletters. Ms. Christine Kemp of the Western Pennsylvania Adult Literacy Resource Center (WPALRC) also was very helpful in assisting the Project Coordinator to identify resources in their collection. To collect sample materials for the notebook, the Project Coordinator called numerous resource organizations and authors requesting resources and information; everyone contacted either provided materials free of charge or gave permission to reprint the materials in the notebook. Appendix C contains a list of the materials collected in the resource notebook.

To develop the trainer's guide (entitled, *WorkNet: Trainer's Guide*), the project staff synthesized and summarized the materials in the resource notebook and the information provided by the workshop presenters in the training sessions. The guide is

flexible and may be used to provide both training and technical assistance. It contains worksheets, checklists, readings, resource databases, and overhead transparencies covering all aspects of workplace literacy. In addition, the guide contains a FAX-back form requesting feedback and suggestions for new information or revisions.

2. *Develop and maintain centralized databases on resource/instructional materials and Pennsylvania workplace literacy trainers.*

To develop the resource/instructional materials database, project staff collected information and materials from the following: 1) "best practices" from the National Workplace Literacy Program; 2) commercial materials (including those recommended by project participants as being especially useful); 3) state 353 projects, especially exemplary projects; and 4) collections in clearinghouses and state literacy resource centers (Appendix D contains a copy of the letter sent to state literacy resource centers). This information is collected in the "Resources: Instructional" section of the *WorkNet: Trainer's Guide*. It is expected that the *NWAC Gopher* (see Appendix E for description) will provide electronic access for maintaining and updating the instructional materials database. For example, some 353 projects such as "*Point Yourself in the Right Direction*" (Project #98-4017) already have been added to the NWAC gopher for national dissemination.

To develop the resource person database, project staff combined the resources identified in a survey by Ms. Meg Keeley of the PAACE Business and Industry Division (see Appendix F) with the suggestions made by coordinators and directors during the site visits to the regional staff development centers. The project staff contacted people on the list and confirmed the information. This information is collected in the "Resources: Persons" section of the *WorkNet: Trainer's Guide*; the guide also includes a FAX-back form to maintain and update the resource person database. It is expected that the resource

person database will be updated and maintained through a cooperative effort between the Project Coordinator and the PAACE Business and Industry Division.

3. *Provide train-the-trainer sessions.*

The Project Coordinator worked with the Regional Staff Development Centers to identify the 17 project participants. The Coordinators or Directors of each center were asked to identify one or two people in their region whom they thought would be interested in obtaining the training and participating in the project. After the participants were identified and contacted, each region received $500 to compensate the participants for their expenses and time.

To prepare for each training session, the project staff outlined potential topics and regional concerns, based on site visits and pre-project needs assessment information (see results in Appendix G). In addition, staff developed and collected current, research-based training materials and resources to address those topics and concerns, identified and contacted presenters, and developed the agenda (Appendix H includes copies of the agendas and press releases about two of the presenters).

In session one, Dr. Jerome Williams (Penn State), Ms. Donna Cheatham (Pennsylvania Blue Shield), and Dr. Fred Schied (Penn State) presented the primary workshop sessions on marketing, working with business, and the union-point-of-view. Ms. Sandra Choukroun (Center for Literacy) and Ms. Michelle Joyce (Greater Pittsburgh Literacy Council) also presented information about their workplace literacy experiences related to those topics.

In session two, Dr. Nickie Askov presented workshops on literacy task analysis, assessment, and evaluation. Ms. Cheryl Hiester (Lancaster/Lebanon IU #13) presented a workshop on fee-for-services as a funding option. Dr. Barbara Woodruff (Adult Education and Job Training Center) and Mr. Brett Bixler (Penn State) presented supplemental sessions on using electronic resources.

Project participants evaluated both training sessions. The "Evaluation" section on pages 7–12 of this report provides a summary of the results.

4. *Provide follow-up technical assistance throughout the project.*

A survey (see Appendix K) was mailed to the 17 project participants in which they were asked to describe the kinds of technical assistance they provided after the training sessions. Their responses are provided in the "Evaluation" section of this report (see page12).

The *WorkNet* project staff provided telephone follow-up technical assistance. For example, calls included requests for specific information regarding research support for productivity gains in workplace literacy programs, specific curriculum materials, or resource persons.

EVALUATION

Evaluation activities of the *WorkNet* project were designed to provide both formative and summative evaluation data. Formative evaluation was primarily informal and included open discussion among project staff and participants of the strengths and weaknesses of the project. For example, at the end of training session one, participants requested specific topics to be covered in the next training session. In addition, participants provided suggestions and revisions to the materials throughout the project. Project staff used all formative feedback to revise the project's procedures and materials. Summative evaluation activities were more formal in nature and consisted of three instruments which are described in detail in the next two sections.

Instruments and Techniques

Project staff developed three questionnaires in which project participants were asked to provide both qualitative and quantitative information regarding the project's

effectiveness. In the first questionnaire, "*Evaluation of Training Session #1*" (see Appendix I), participants were asked to provide quantitative information (provide feedback on a scale of 1 to 5) regarding their prior knowledge of the training topics and of the quality of the workshop presenters, topics, and training session. In addition, they were asked to provide qualitative information (answer open-ended questions) regarding concepts they learned during training and questions or concerns about the project.

The second questionnaire, "*Evaluation of Training Session #2*" (see Appendix J), was designed in a similar manner as the first one. However, participants also were asked to provide information regarding options for the future of the project. For example, they were asked if they would be willing to serve as a mentor in their region and under what conditions they would be willing to do so. Participants also were asked to rate conditions for continuing the project and provide any additional comments about the project and its future.

The third questionnaire, "*Fax-Back Follow-up Survey*" (see Appendix K), was designed to elicit qualitative information regarding the nature and extent of participants' use of the project information and materials. For example, participants were asked to describe any training or technical assistance they provided as well as circumstances in which they used the materials or resources.

Results

For the sake of brevity, this section provides only the most pertinent results of the three evaluation instruments. The questionnaires in Appendices I and J provide a complete listing of results.

1. *Evaluation of Training Session #1:* On quantitative questions regarding prior knowledge of the topics (1–not at all familiar, to 3–somewhat familiar, to 5–very familiar), participants were somewhat familiar with the topics. For example, the average responses were 3.3 (workplace literacy efforts in the state); 2.9 (familiarity with various

stakeholders); 3.1 (establishing and maintaining partnerships); and 2.9 (marketing and funding).

Responses to quantitative questions regarding effectiveness of the training were high. For example, on a scale of 1–not at all helpful, to 3–somewhat helpful, to 5–very helpful, the average responses were as follows: 4.5 (speakers); 4.5 (topics); and 4.0 (training session met expectations).

Qualitative information regarding concepts learned included the selected responses that follow. In general, participants' responses indicate concept growth in the topics covered in the session. Many of the responses contain "bits of wisdom" that have been incorporated into the trainer's guide.

- *Importance of maintaining positive relationships*
- *It's hard to break into a company; now I can see the need for this project*
- *Workplace literacy programs are more widespread than I realized*
- *Kinds of providers are as different as the regions they serve*
- *Sometimes you have to say "no" to a company that wants the program to accomplish unrealistic or unethical objectives*
- *Make sure goals and expectations of educator and company are defined clearly!*

Participants responded as follows regarding questions or concerns they had for the second training session. Their responses guided the planning of the second training session and also were incorporated into the trainer's guide and in the "Recommendations" section of this report.

- *It would be helpful to develop a list of companies in your region.*
- *We need more information about funding options.*
- *We need more information on legal issues.*
- *I'd like more information on partnerships.*

2. *Evaluation of Training Session #2*: On quantitative questions regarding prior knowledge of the topics, participants were once again somewhat familiar (1–not at all familiar, to 3–somewhat familiar, to 5–very familiar) with the topics. For example, the average responses were 2.9 (fee-for-services); 3.2 (literacy task analysis); 3.5 (assessment options); 3.0 (program evaluation); and 2.8 (resources).

Responses to quantitative questions regarding effectiveness of the training were quite high for this session. For example, on a scale of 1–not at all helpful, to 3–somewhat helpful, to 5–very helpful, the average responses were as follows: 4.5 (speakers); 4.5 (topics); and 4.4 (training session met expectations). In addition, this questionnaire included quantitative questions regarding the entire project. Responses to these questions also were quite high. For example, 4.2 (project adequately trained participants); 4.2 (training will be useful); and 4.8 (training materials). To the question, "Do you think this project should be continued in some way?" the average response was 4.4.

Qualitative information regarding concepts learned included the selected responses that follow. Once again, comments reflect changes in participants' concept backgrounds and specific knowledge about effective workplace literacy programs.

- *I never realized PDE funded organizations could use "fee-for-services" as a funding option for workplace literacy programs.*
- *Don't underestimate costs!*
- *Put disclaimers on the assessment test!*
- *Be sure the contract is on company letterhead.*
- *The idea of being more selective in hiring people to teach in workplace literacy programs was something I had not considered at any length.*
- *Literacy task analysis should be a collaborative effort.*
- *There are a variety of options for doing a literacy task analysis.*
- *Observe over time when doing a literacy task analysis.*
- *The TABE has a work-related test.*

- *I's often a good idea to use a variety of assessment options.*
- *Reminders on how to establish validity and reliability of self-developed tests.*
- *Evaluation of the program should be done by the company, the employee, and the instructors (all stakeholders) to get any kind of realistic data about the program..*
- *Help companies decide what they will track.*

The last part of this questionnaire concerned the future of the *WorkNet* project. To the question, "Would you be willing to serve as a mentor for new workplace literacy providers in your region," the majority of participants are indeed willing to be more involved in workplace literacy efforts in Pennsylvania. Ten people responded yes, two said maybe (depending on their gaining more experience), and one said no since she is an employee of PA Department of Transportation. Reasons for responding as they did were as follows:

- *I would really like to become much more involved with workplace literacy programs of all kinds.*
- *I think I could "mentor" any of the programs in my region which want to get involved in a workplace literacy project.*
- *Without those individuals available to me when I started, I would have had to do a lot more learning by making mistakes. Also, I like the opportunity to gain from their experiences as well.*
- *Experience is important and I have the experience. Conditions don't matter.*
- *A project like this is worthless unless participants are willing to carry what they've learned into their regions.*

Seven respondents said the most important condition for continuing the project was "the need for coordination and on-going training of workplace literacy providers in Pennsylvania"; five said "adequate funding"; and four said "the need for workplace literacy services in the business community." And finally, when asked for which topics they would like more intensive training, nine people checked legal issues, seven

requested adapting existing curricula, seven requested using technology, and five checked marketing.

3. *Fax-Back Follow-up Survey* The response to this survey was limited, perhaps because it coincided with the end of the fiscal year and summer vacations. However, those who responded indicated that they had used the materials and information from the project in a variety of ways. For example, when asked if participants had make contacts with potential partners, one respondent said their organization did cold calling and a follow-up mailing to over 100 businesses and agencies; six of the businesses have since become clients. Three other respondents said their organizations had contacted two or three other organizations for future partnerships and contracts.

When asked how participants used the materials or information from the training, three respondents said they used them to prepare for meetings and presentations. One respondent used statistical information from the training to illustrate the need for workplace literacy programs to a potential partner; another wrote an article for a newsletter and shared the materials with her supervisor and coworkers. Another respondent met in-house with two other providers to discuss evaluation measures.

When asked what else needed to be done to provide coordination of workplace literacy efforts in the state, all of the respondents said that literacy providers must work more closely and coordinate directly with the business community. Suggestions included meetings where business and government can contact literacy providers and a "literacy fair" where literacy providers can make employers more aware of their services and the costs.

DISSEMINATION

Copies of all *WorkNet* products (final report, resource guide, and trainer's guide, which includes the resource databases) have been provided to AdvancE, the Western

Pennsylvania State Literacy Resource Center, and ERIC. In addition, all project participants received copies of the resource guide and trainer's guide to share with their Regional Staff Development Centers and the programs in their region.

The Institute for the Study of Adult Literacy will continue project dissemination with an announcement in *What's the Buzz* (see Appendix L) and a press release in an upcoming edition of *Mosaic* (the Institute's newsletter). An article regarding the project will be drafted and sent to a professional journal, such as *Adult Learning*. In addition, the project staff will work with the PAACE Business and Industry Division to explore other options for disseminating the resource person database and other *WorkNet* products.

CONCLUSIONS AND RECOMMENDATIONS

The *WorkNet* participants had a variety of previous workplace literacy experiences and backgrounds. Some came from regions with thriving local economies and were facing an increased demand for their workplace literacy services. Others came from communities with large numbers of dislocated workers and where the business sector showed little or no interest in workplace literacy programs. Such diversity enabled all participants to broaden their knowledge of Pennsylvania's workplace literacy efforts as they shared experiences, ideas, resources, concerns, and strategies among each other and with the workshop presenters. At the same time, the state's workplace literacy network was expanded as the 17 participants were trained to provide current, research-based workplace literacy training in their regions.

Conclusions

The *WorkNet* project was highly rated by the project participants and was effective in meeting all its goals. The resource materials and databases were useful and timely and participants used them for marketing, curriculum development, and program

planning during and after the project. The training sessions also were highly effective, and participants said they looked forward to more in-depth training opportunities, especially on funding, legal issues, and adapting curricula.

Participants overwhelmingly agreed that the project should be continued in some way (average response was 4.4 on a scale of 1–no, to 5–yes). The number one reason given for continuing the project was the need for coordination and on-going training of providers. Some participants expressed concern about the lack of financial support and insufficient staff time to provide ongoing training and technical assistance in the future.

Recommendations

The *WorkNet* project staff recommend the following:

1. In order for the state to benefit from the work begun in this project, PDE should provide financial support for follow-up training (using the "train–the–trainer" model used in this project) as well as support for project participants to mentor others in their region. Such a project would give successful practitioners a forum in which to share their experiences and wisdom and also allow participants to explore the changing roles of the various workplace literacy "players" and keep abreast of new developments, programs, and resources.

2. All regions should become more proactive in marketing workplace services and seeking fee-for-services contracts, as several participants and the research demonstrated the effectiveness of these approaches.

3. All interested persons should use the project products for technical assistance. For example, people in the resource person database can be contacted to provide telephone assistance in their areas of expertise.

3. The Regional Staff Development Centers should contact project participants to provide regional workplace literacy training workshops, technical assistance, resources, and information.

4. All project participants should continue to support the project by using the FAX-back forms in the trainer's guide to suggest effective materials, resources, and trainers in their region.

5. All project participants and other interested persons should access work-related electronic resources, such as listservs, gophers, and databases. For example, the *NWAC Listserv* (Appendix E) and the *NIFL–Workplace Listserv* (Appendix L) provide a wealth of recent information, resources, and thought-provoking discussion. The *NWAC Gopher* provides access to NWAC products, staff training materials, research databases, program guides, articles, current information, and bibliographies.

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APPENDIX A

Needs Assessment for *WorkNet*: Professional Development for Regional Staff Development Program Staff

The Bureau of Adult Basic and Literacy Education plans to provide training for Regional Staff Development staff in planning, developing, and evaluating workplace literacy programs. This training will employ a train-the-trainer model, providing materials that can be used to train local program staff. Your responses to the following questions will assist in designing the training to best meet your training needs and interests.

1. In which of the following areas would training be most useful to build *your* knowledge about workplace literacy? *Please number your responses from 1 (most useful) to 12 (least useful).*

_____ marketing workplace literacy services to local businesses, industries, and/or labor organizations

_____ establishing and maintaining a partnership (e.g., roles and responsibilities, management, troubleshooting)

_____ selecting job(s) or job domain(s) for basic skills improvements

_____ conducting literacy task analyses

_____ selecting appropriate delivery system (e.g., CAI, group instruction, independent learning, tutoring)

_____ designing curricula based on literacy task analyses and using work-related materials

_____ developing assessment instruments (e.g., criterion-referenced, curriculum-based)

_____ identifying appropriate commercially available instructional materials

_____ estimating costs of developing/implementing a new program

_____ identifying potential sources of funding

_____ implementing and managing the program

_____ evaluating the effectiveness of the program in meeting partners' needs and interests (e.g., adult educators, business/industry trainers, labor organizations, and employees)

2. What types of information and resources would be most useful to build *your* background knowledge about workplace literacy? *Please number your responses from 1 (most useful) to 4 (least useful).*

_____ readings on current research and theories regarding workplace literacy/workforce education (e.g., journal articles, abstracts/executive summaries of reports and other publications)

_____ annotated lists of available resources (sample curricula, instructional materials, effective program models, trainers)

_____ a Pennsylvania database including information on qualified, effective trainers in workplace literacy [guide to scheduling expert trainers to conduct local workshops]

_____ other; please describe: _____
_____
_____

3. What training environment would be most appropriate for *you*? *Please number your responses from 1 (most appropriate) to 4 (least appropriate).*

_____ series of workshops in Harrisburg with follow-up assistance available from the trainers throughout the year

_____ series of training sessions (e.g., a workshop followed by review session to share experiences and discuss problems/issues related to workshop)

_____ series of teleconferences followed by review sessions to share experiences and discuss problems/issues related to teleconference

_____ other; please describe: _____
_____
_____

4. Trainers will provide technical assistance to supplement the training. What type(s) of technical assistance would you prefer? *Please number your responses from 1 (most prefer) to 4 (least prefer).*

_____ telephone

_____ electronic mail (Penn Link)

_____ on-site (local or regional)

_____ group sessions as follow-up to training session

5. What training materials would best help you in training local ABLE staff to develop workplace literacy programs? *Please number your responses from 1 (most useful) to 5 (least useful).*

_____ a "how to" manual on developing workplace literacy programs

_____ trainer's/leader's guide

_____ handouts (e.g., checklists, readings, sample materials, etc.)

_____ overhead masters and transparencies

_____ videotapes

APPENDIX B

WorkNet Participants

Laura Beach (Region 2)
CIU #10, Development
Center for Adults
540 North Harrison Road
Pleasant Gap, PA 16823
814-354-3069

Joseph T. Beech (Region 8)
Adult Education Director
Norristown School District
1900 Eagle Drive
Norristown, PA 19403
610-630-5066

Sandra D. Choukroun (Region 9)
Workforce Education Coordinator
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19143
215-474-1CFL

Nancy Disario (Region 7)
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Bethlehem, PA 18017
610-867-8533

Rebekah Flanagan (Region 3)
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Scranton, PA 18505
717-961-7834

Leslie Foster (Region 3)
Bradford Community Action
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Towanda, PA 18848
717-265-4434

Brian Frey (Region 5)
Region 5 Coordinator
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Lewistown, PA 17044
717-248-4942

Cheryl Hiester (Region 6)
Workforce Education Coordinator
Adult Enrichment Center
31 South Duke Street
Lancaster, PA 17602
717-293-7636

Michelle Joyce (Region 4)
Workplace Coordinator
Greater Pittsburgh Literacy Council
100 Sheridan Square
Pittsburgh, PA 15206
412-661-READ

Gail Leightley (Region 2)
Region 2 Coordinator
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Pleasant Gap, PA 16823
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Beverly Smith (Region 6)
Region 6 Director
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717-232-0568

Lee Stahl (Region 2)
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Marleen Steele (Region 6)
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Transportation and Safety Building,
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717-787-5016

Margaret Welliver (Region 2)
Coordinator of ABLE,
Community Education
State College Area School District
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State College, Pennsylvania 16801-5289
814-231-1061

Mike Wilson (Region 2)
Program Manager
Adult Education
Central Susquehanna Intermediate Unit
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Lewisburg, PA 17837-0213
717-523-1155

Kate Wood (Region 1)
Northwest Tri-County IU 5
670 West 36th Street
Erie, PA 16508
814-866-3775

Dr. Barbara Woodruff (Region 5)
TIU Adult Education and Job Training
Center
MCIDC Plaza, Building 58
One Belle Avenue
Lewistown, PA 17044
717-248-4942

APPENDIX C

Materials in *WorkNet: Resource Notebook*

Section 1: Overview: The National Picture **(Turquoise)**
- Information from National Adult Literacy Survey
- Data from America 2000 Goals Report
- High Performance Workplace Information
- Related ERIC Digests and Minibibs

Section 1: Overview: The Pennsylvania Picture **(Blue)**
- Profile of Adult Literacy Levels in the State Adult Literacy Survey
- Pie Chart of # of Adults Served in PA Programs
- National Education Goals Data
- 1990 Census Data
- PA Workforce 2000 Data
- ABLE Survey Data
- Results of Survey of Employers of ESL Adults in Entry-Level Jobs
- PA 2000 Adult Literacy Task Force Call to Action

Section 2: The Groundwork: Marketing **(Yellow)**
- Pennsylvania 2000 Adult Literacy Task Force Marketing Pieces
- Greater Pittsburgh Literacy Council (1994): Workplace Literacy Experiences and Recruitment Plan (see Objectives 3-6 for marketing suggestions)
- ABLE Survey Marketing Data
- Center for Literacy Workplace Literacy Marketing Pieces
- Return on Investment

Section 2: The Groundwork: Funding **(Ivory)**
- PA 2000 Adult Literacy Task Force: Inventory of Funding for Adult Basic and Literacy Education Programs
- ABLE Survey Funding Data
- Sample Proposal and Cost Estimate
- PA Economic Development Partnership Business Assistance Programs Matrix
- BCEL Bulletin: Make it Your Business: A Corporate Fundraising Guide for Literacy Programs

Section 3: The Network: Building Partnerships **(Violet)**
- Keys to Coordination
- Guidelines for New Partners
- Tips on Coalition Building
- National Workforce Assistance Collaborative: Workplace Literacy Interview Guide
- Union Point of View: Workplace Literacy

Section 4: The Literacy Work: Curriculum and Instruction **(Dark Green)**
- Curriculum Design for Workplace Literacy
- Developing Curriculum that Works - The Role of Workplace Educational Skills Analysis
- What Makes Workers Learn? The Role of Incentives in Workplace Education & Training

Section 4: The Literacy Work: Assessment **(Light Green)**

- Approaches to Assessment in Workplace Literacy Programs: Meeting the Needs of all Clients
- Alternative Assessment: Use of Portfolio Assessment in a Workplace Literacy Program
- Alternative Assessment for Adult Learners

Section 4: The Literacy Work: Evaluation **(Medium Green)**

- Workplace Educational Evaluation Design Checklist
- Team Evaluation: A Guide for Workplace Education Programs
- Education Brief: Using Portfolios in Program Evaluation

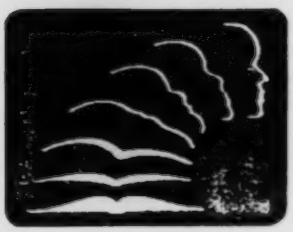
(In Folder #1)

- The New American Workplace (AFL-CIO Committee Report, 1994)
- Foundations for a Competitive Edge (Illinois Resource Development Center Special, 1995)
- Employment Outlook in Pennsylvania Industries and Occupations
- Pennsylvania Civilian Labor Force Series
- Choosing the Right Training Program: A Guidebook for Small Businesses (U. S. Department of Education, U. S. Department of Labor)
- National Center for Manufacturing Sciences (4 newsletters)
- BCEL Brief: Basic Skills in Small Businesses (Revised June 1993)
- VESL/Workplace Clearinghouse Catalog
- W. E. Upjohn Institute for Employment Research Catalog
- Business Publishers, Inc. Catalog
- Illinois Workforce Preparation Catalog
- ASTD Resource Card Deck
- Brochures from NNCCTVE, Workeys

(In Folder #2: NWAC Products)

- Workforce Briefs #1–4
- Business Assistance Note #1
- Workplace Literacy Product Checklist
- Workplace Literacy Interview Guide
- Brochure
- Workplace Literacy Publications: Annotated Bibliography of Print Resources
- Resource Guide: A Key to Organizations Working in Employee Training, Labor/Management Relations, Work Restructuring, and Workplace Literacy

APPENDIX D



INSTITUTE
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LITERACY

January 6, 1995

To: State Literacy and Adult Education Resource Centers

The Institute for the Study of Adult Literacy at the Pennsylvania State University has received a Section 353 grant from the Pennsylvania Department of Education to expand Pennsylvania's workplace literacy provider network. Part of the project includes developing a database of state and national workplace literacy resource persons, curricula, instructional materials, organizations, and readings.

We would like to know if your state currently has a directory or database relating to these topics. If you do already have this information compiled, we would appreciate receiving a copy to include with our database. If you do not have this information could you please suggest another contact person from your state to whom we could redirect our inquiry. Thank you for your consideration of this matter.

Sincerely,

Priscilla S. Carman

Priscilla S. Carman
Project Coordinator

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University Park, PA 16801-4756
814-863-3777
Fax: 814-863-6108
Internet: ISAL@PSUVM.PSU.EDU

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APPENDIX E

National Alliance of Business

National Workforce Assistance Collaborative Newsletter

Stephen Mitchell, Project Director
Terri Bergman, Products and Services Manager

April 1995

. . . the Newsletter for organizations and individuals working closely with the National Workforce Assistance Collaborative to improve the competitiveness of small and mid-sized businesses and the skills of the American workforce.

New Partner

The Collaborative wants to formally welcome the Council for Adult and Experiential Learning, its new partner for employee training. The Council has over twenty years of experience in the field of adult education.

Electronic Access

The Collaborative has entered the electronic age. The Institute for the Study of Adult Literacy at Penn State University, a Collaborative partner, has set up a listerv and gopher server for the Collaborative.

The listserv, NWAC-L, is an electronic forum for discussing issues, sharing information (e.g., instructional strategies and materials, research and its applications, staff training approaches, evaluation methods), and reviewing/critiquing materials produced by the Collaborative.

The NWAC Gopher Server provides online access to materials and products produced by NWAC as well as additional instructional and staff training materials, research, databases, bibliographies, program guides, reports, and articles concerning small and mid-sized businesses and the challenges they face.

To subscribe to NWAC-L, send an e-mail message to LISTSERV@PSUVM.PSU.EDU. Leave the subject line blank. The body of the message must contain only the following: subscribe NWAC-L YourFirstName YourLastName.

The Gopher Server address is INFO.PSU.EDU. After you reach the Gopher Server, open "Information Servers at Penn State," then open "Research Centers and Institutes" to find the National Workforce Assistance Collaborative Gopher site.

Please sign up for the listserv and peruse our Gopher Server.

Current Product Development

The Collaborative has lined up an exciting product development agenda for its second year. Nine projects were selected for development after extensive work eliciting the priorities of the Collaborative's three key service provider customer groups -- workplace literacy providers, community colleges, and manufacturing extension centers and programs. Four of the projects will be developed by a team of individuals led by a Collaborative partner. The nine projects are:

- *Business Market Segments* - Identification of the "market segments" within small and

APPENDIX F

PLEASE COMPLETE AND RETURN

Directory of PAACE Workplace Literacy Providers

The Business and Industry Division of PAACE, in conjunction with the Institute for the Study of Adult Literacy is developing a directory of workplace literacy providers in Pennsylvania. The purpose of this directory is to provide PAACE members with a listing of persons with whom they can network and share expertise and resources regarding workplace literacy.

If you would like to be listed, complete the survey and return to Meg Keeley, 3200 Glendale Drive, Bensalem, PA 19020. Copies of the directory will be available at next year's Midwinter Conference and through state and regional resource centers.

Name/Title: _____

Organization: _____

Address: _____

Phone: _____ **Fax:** _____

Area(s) of Expertise:

- ☐ Instruction/Training: (subjects) _____
- ☐ Instructional Design (subjects) _____
- ☐ Liaison with business and industry
- ☐ Liaison with government
- ☐ Liason with unions
- ☐ Grants/proposal
- ☐ Marketing/PR
- ☐ Research
- ☐ Technology/dissemination
- ☐ Other: _____

What types of industries have you worked with (i.e., hospital, transportation, etc.)?

Who is providing the funding for your work?

What curriculum or assessment instruments have you developed?

Would you be willing to share it with other persons in the state?

☐ yes ☐ no _____

➲ If you would like your curricula and materials to be made available electronically on a gopher server for the National Workforce Assistance Collaborative (NWAC), contact: Priscilla Carmen at the Insitute for the Study of Adult Literacy, Pennsylvania State University College of Education, 204 Calder Way, Suite 209, Universtiy Park, PA 16801-4756, Phone: 814-863-3777, Fax: 814-863-6108 or Internte: ISAL@PSUVM.PSU.EDU

OVER

How would you be willing to become more involved in the Business and Industry Division of PAACE?

☐ Newsletter/Mailings
☐ Regional Meetings
☐ Midwinter Conference Planning
☐ Other
☐ Representation on the PAACE Board
☐ Present at Midwinter
☐ Teleconferencing

What topic(s) related to Business and Industry would you most like to learn more about?

MEG KEELEY
3200 GLENDALE DRIVE
BENSALEM, PA 19020

APPENDIX G

WorkNet Needs Assessment Results

1. Training topics

marketing workplace literacy services to local businesses, industries, and/or labor organizations

1	3	7/11	0
2	1	12	1 (cc)
3	2		
4	0		
5	0		
6	1 (gplc)		

establishing and maintaining a partnership (e.g., roles and responsibilities, management, troubleshooting)

1	2	7/11	2
2	2	12	1 (gplc)
3/4	0		
5	2		
6	1		

identifying potential sources of funding

1	2	7/10	0
2	0	11	1 (reg. 3)
		12	1 (reg 9)
3	1		
4	2		
5	1		
6	0		

designing curricula based on literacy task analyses and using work-related materials

1	0	7	2
2	1	8 - 12	0
3	1		
4	3		
5	0		
6	1		

developing assessment instruments (e.g., criterion-referenced, curriculum-based)

1	0	7	1
2	1	8	1
		9 - 11	0
3	1	12	1 (cabrini)
4	1		
5	2		
6	0		

estimating costs of developing/implementing a new program

1	0	7	0
2	1	8	1
		9	1
3	1	10	1
4	0	11	0
		12	1 (erie)
5	1		
6	1		

implementing and managing the program

1	0	7	0
2	1	8	2
		9	1
3	1	10	0
4	0	11	2
		12	0
5	0		
6	1		

conducting literacy task analyses

1	1	7	0
2	0	8	2
		9	2
3/4	0	10	1
		11	1
5	0	12	0
6	1		

identifying appropriate commercially available instructional materials

1	0	7	1
2	1	8-10	0
		11	4
3/4	0	12	2
5/6	0		

selecting job(s) or job domain(s) for basic skills improvements

1/2	0	7	1
	8	1	
3	1	9	2
4	1	10	1
	11/12	0	
5	1		
6	0		

evaluating the effectiveness of the program in meeting partners' needs and interests

1/2	0	7	2
		8	0
3	0	9	1
4	1	10/11	0
		12	1
5	1		
6	2		

selecting appropriate delivery system (for ex. CAI, tutoring, etc)

1/2	0	7	1
		8	1
3/4	0	9	1
		10	5
5/6	0	11/12	0

2. Types of information and resources useful to build *your* background knowledge about workplace literacy

annotated lists of available resources (sample curricula, instructional materials, effective program models, trainers)

1 4
2 2
3 3

a Pennsylvania database including information on qualified, effective trainers in workplace literacy [guide to scheduling expert trainers to conduct local workshops]

1 3
2 3
3 3

readings on current research and theories regarding workplace literacy/workforce education (e.g., journal articles, abstracts/executive summaries of reports and other publications)

1 3
2 3
3 3

gplc: role of literacy councils and partnerships in workplace education,
erie: $ to visit good programs

3. Training environment appropriate for *you*

series of training sessions (e.g., a workshop followed by review session to share experiences and discuss problems/issues related to workshop)

1	7
2	2
3	0

series of workshops in Harrisburg with follow-up assistance available from the trainers throughout the year

1	2
2	4
3	1
4	2

series of teleconferences followed by review sessions to share experiences and discuss problems/issues related to teleconference

1	0
2	3
3	6

erie: workshops held in region to cut time/$ for them to travel to us; star: workshops at PSU

4. Technical assistance to supplement training

telephone

1	4
2	3
3	2
4	2

on-site (local or regional)

1	3
2	3
3	3
4	0

group sessions as follow-up to training session

1	2
2	1
3	5
4	0

electronic mail (Penn Link)

1	0
2	2
3	3
4	4

5. Training materials

a "how to" manual on developing workplace literacy programs

1	4
2	2
3	1
4	1
5	1

videotapes

1	2
2	3
3	1
4	0
5	3

trainer's/leader's guide

1	2
2	1
3	2
4	3
5	1

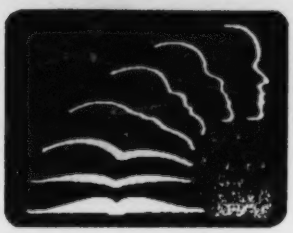
handouts (e.g., checklists, readings, sample materials, etc.)

1	1
2	1
3	5
4	2

overhead masters and transparencies

1	0
2	2
3	0
4	3
5	4

APPENDIX H



INSTITUTE
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LITERACY

Agenda

WorkNet: Training Session #1

Tuesday, February 28, 1995

11:00 - 11:30	Welcome and Overview
11:30 - 11:40	Funding
11:40 - 12:45	Marketing
12:45 - 1:45	Luncheon
1:45 - 2:00	Finding the Missing Link
2:00 - 3:00	Working with Employers
3:00 - 3:10	Short Break
3:10 - 4:00	Working with Unions
4:00	Evaluation/Departure

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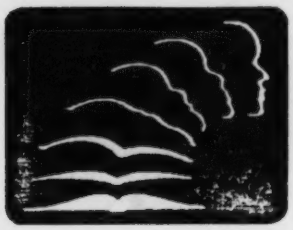

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LITERACY

Welcome to WorkNet Training Session #1

The goal of the WorkNet project is to expand Pennsylvania's capacity for providing workplace literacy services. Participants in this project represent some of the state's most experienced workplace literacy providers as well as newcomers to the field. We look forward to working with all of you on this project.

This first session will provide an overview of workplace literacy in the state, including a look at the Pennsylvania picture, how and why education providers must "sell" the idea of workplace literacy, and who the players are and how we can work together. We are privileged to have Dr. Jerome Williams, Ms. Donna Cheatham, and Dr. Fred Schied as trainers, and Ms. Sandra Choukroun, Ms. Michelle Joyce, and Ms. Cheryl Hiester, experienced providers who will discuss their workplace literacy experiences in Pennsylvania.

We are confident that you will both learn from and enjoy the training sessions. Let us know what you think. ***Please complete and submit your evaluation form before leaving today***. And please ask for assistance if you have any questions or problems.

Priscilla

Priscilla Carman
Project Coordinator

Nickie

Dr. Eunice Askov
Project Director

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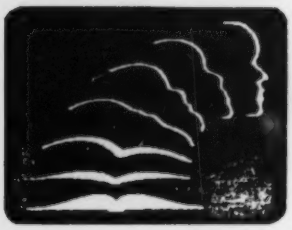

INSTITUTE
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LITERACY

Agenda
WorkNet: Training Session #2
April 4, 1995

Welcome to WorkNet Training Session #2. We are privileged to have **Ms. Cheryl Hiester**, Workforce Education Coordinator from Lancaster/Lebanon Intermediate Unit, **Dr. Eunice N. Askov**, Director of the Institute for the Study of Adult Literacy, **Brett Bixler**, Instructional Designer from the Institute for the Study of Adult Literacy, and **Dr. Barbara Woodruff**, Counselor from the Lewistown Adult Education and Job Training Center, as presenters for today's session.

11:00 - 11:15	Welcome
11:15 - 12:15	Fee-for-Services
12:15 - 12:45	Resources
12:45 - 1:45	Luncheon
1:45 - 2:15	Literacy Task Analysis (or Alternatives)
2:15 - 2:45	Electronic Resources
2:45- 3:00	Break
3:00 - 3:50	Assessment and Program Evaluation
3:50 - 4:00	Project Evaluation and Departure

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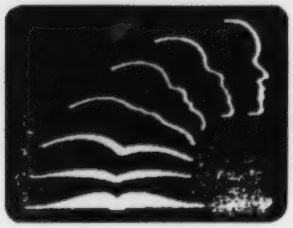

INSTITUTE
FOR THE STUDY
OF ADULT
LITERACY

MEMORANDUM

TO: WorkNet Participants
FROM: Dr. Eunice Askov, Project Director EA
Priscilla Carman, Project Coordinator PC
DATE: March 17, 1995
RE: Training Session #2

The second training session for the WorkNet project is scheduled for April 4, 1995 from 11 a.m. to 4 p.m. at the Penn State Scanticon. The evaluations from the first session were very positive; however, some participants had hoped for more in-depth coverage of some topics. We have tried to address these gaps in the second session. We plan to address the following topics:

- Funding Options
- Workplace Literacy Curricula
- Workplace Literacy Programs - Assessment and Evaluation
- Resources
- The Future

The WorkNet group is a blend of experienced and new workplace literacy providers. Please respond to the enclosed survey of your experience using a literacy task analysis to develop curriculum. We will use this information to break the "Curricula" session into two or three concurrent sessions, based on your responses to the survey. Please fax back the form to Priscilla Carman at **FAX # 814-863-6108** by March 24, 1995.

Participants will receive the second part of the resource notebook with materials addressing the above topics. We will also have a display table of materials that are available in the state, commercially, and from other states. If you have any excellent resources you think others should know about, please bring them to display at the training session. All materials will be returned after the session. Also, if you have any materials you would like to make available on the National Workforce Assistance Collaborative (NWAC) electronic gopher, please bring a disk copy to be installed on the gopher server. For example, Dr. Gonzalez from Region 7 has provided a disk copy of "Point to Yourself in the Right Direction: Self-Test of Reading and Math Skills for Employees." Posting materials on the gopher server is an economical way to ensure that your products are disseminated and an easy way to obtain materials and information from others.

We look forward to seeing you on April 4. Please contact Priscilla Carman at 814-863-3777 if you have any questions or concerns.

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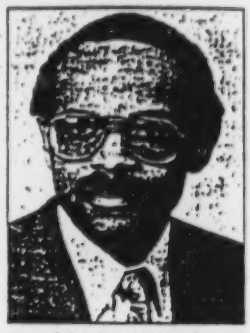
Associate professor receives appointment

Jerome D. Williams, associate professor of marketing in The Smeal College of Business Administration, has been appointed a visiting senior fellow in the School of Accountancy and Business at Nanyang Technological University (NTU) in Singapore.

Dr. Williams will spend the 1995-96 academic year teaching marketing classes at NTU and conducting research on the cultural implications of business-to-business relationships in Pacific Rim countries, focusing on Singapore and Korea.

Dr. Williams has conducted research in business marketing and has gained national recognition for his work in ethnic minority marketing. An expert in the field of ethnic consumer behavior, he has been a witness in court cases involving ethnic consumer issues and was involved in widely publicized debates on the target marketing of cigarettes, beer and other products to minorities.

Teaching in the area of business-to-business marketing, Dr. Williams also conducts research that explores trade show performance, industrial marketing and industrial buyer-seller relationships.



Jerome D. Williams

About the Book

Learning in Social Context

Learning in Social Context contributes to an emerging reconceptualization of adult education—one that include the educational experiences of most people, not just an elite. Fred Schied shows that adult education played a crucial role in creating a German-American workers' culture which was to have a profound impact on the American working class. By examining the meaning and impact of adult education within a community in Chicago, Schied suggests ways of expanding conceptions of adult education.

ISBN 1-879528-04-5, pp. 222, $15.95; $10.00 text (for classroom use); 1993.

About the Author

Fred M. Schied was born in a refugee camp in post-World War II Austria. Having been raised in a German working-class neighborhood in Chicago, Fred is keenly aware of the links to the rich traditions of the German community life. He was faced with the great unspoken fact of daily life in the United States: social class. As the grandson, son, and nephew of immigrant janitors and cleaning women, he was constantly reminded of the class divisions in this officially classless society. Among his many accomplishments, Schied has been active in academia for over a decade, he has published numerous articles, and was co-founder of the *Historical Foundations of Adult Education Bulletin.*

Aside from the clever structure and compelling argument of the book, it has other strengths. One is that it is well written; the text is crisp and the narrative flows smoothly. As an immigrant himself, Schied is able to bring alive the immigrant experience and, by drawing on primary sources in German, he exemplifies the advantage he extols: namely that of going beyond English language sources.

—Phil Candy, Queensland University of Technology, this excerpt is taken from a review in *Studies in Continuing Education* (Australia)

. . . is an innovative and pioneering work that recaptures the lost history of workers' education.

—Michael Welton,
Professor, Dalhousie
University, Nova Scotia

Dr. Schied's timely book focuses the spotlight onto an aspect of adult education that has been seriously neglected in the U.S. Writing from the perspective of a labor historian, Schied connects workers' interest and struggles with social learning processes. Learning in Social Context concerns that an informed practice of adult education needs to take class analysis and class consciousness into account.

—Michael Collins,
Professor, University of
Saskatchewan, Canada,
author of *Adult Education as Vocation: A Critical Role for the Adult Educator*

APPENDIX I

WorkNet
Capacity Building for Pennsylvania's Workplace Literacy Provider Network

Training Session I Evaluation
February 28, 1995

Information on this evaluation form will help us determine whether the format and content of this training has been appropriate and effective.

1. *Prior to this training session,* how familiar were you with workplace literacy efforts in Pennsylvania?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all familiar		Somewhat familiar		Very familiar
	2	**6**	**3**	**2**

Average: 3.3

2. Briefly *state one important concept you learned* about workplace literacy efforts in the state during this training session.

- Maintaining positive relationships
- marketing- looking at perceptions and interpretations
- urban areas are active
- that wp programs <u>can</u> be effectively sold
- so much revolves around money and politics- funding is cut, write grants, ask cos. to pay
- hard to "break" into a company; now can clearly see need for this project
- union information valuable
- need more collaboration
- much more widespread than I realized
- hard to find comapanies
- varied, in infancy

3. *Prior to this training session,* how familiar were you with various players or stakeholders involved in workplace literacy efforts in the state?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all familiar		Somewhat familiar		Very familiar
1	**3**	**7**	**1**	**1**

Average: 2.9

4. Briefly *state one important concept you learned* about various players or stakeholders involved in workplace literacy efforts in the state during this training session.

- wp lit takes many forms; programs need to deal with particular client
- no change
- some are active
- a lot of expertise out there
- meet new people
- so many different agencies providing services
- providers are as different as geographic regions they serve
- union point of view valuable
- surprised about the numbers and varieties of organizations getting involved
- who does what
- work closely; understand the workplace!
- work with unions and their needs first
- have untapped expertise

5. *Prior to this training session,* how familiar were you with establishing and maintaining partnerships?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all familiar		Somewhat familiar		Very familiar
1	**2**	**6**	**2**	**2**

Average: 3.1

6. Briefly *state one important concept you learned* about establishing and maintaining partnerships during this training session.

- Blue Shield partnerships and optimizing relationships
- Think pro-union when dealing with unions
- Small business partnerships can be more beneficial
- That some should be turned down and it is okay to say no
- The marketing concept on how to properly present your program and the terminology was extremely informative.
- communicate expectations up front
- I feel that we did not touch very much on this area in the seminar
- Learned about the Council for Adult and Experiential Training
- It's important to know your "players"
- Make sure goals and expectations of educator and company are defined clearly!
- It's critical to form a team effort with a company to share responsibility for recruitment etc. as well as sharing of costs.

7. *Prior to this training session,* how familiar were you with the marketing and funding options for workplace literacy in PA?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all familiar		Somewhat familiar		Very familiar
2	**4**	**2**	**3**	**2**

Average: 2.9

8. Briefly *state one important concept you learned* about the marketing and funding options for workplace literacy in PA.

- Funding structures for working with companies and charging for services.
- Perceptions are important!
- Funding wasn't really covered will enough
- Not a tremendous amount.
- Diffusion theory
- The concept that some companies are innovators and how to spot them was very interesting!
- Use local business resources (Chamber of Commerce, Small Business Organ. etc.) for information and worksites.
- nothing new
- need to get information out to employers about what workplace literacy is all about in order to be more successful
- I wanted to learn more about setting up fee-for-service programs.
- Image and innovation
- There are many ways to fund a work-site program other than PDE support. Once ABE Workplace funds are used to establish a literacy program then a company will support future

9. How helpful were the speakers?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all helpful		Somewhat helpful		Very helpful
			6	**7**

Average: 4.5

10. Generally, how *useful* were the topics covered in the training session?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all useful		Somewhat useful		Very useful
			6	**7**

Average: 4.5

11. Overall, to what extent did this training session *meet your expectations*?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all		Somewhat		Completely
		2	**7**	**3**

Average: 4.0

12. We want to ensure that this project meets *your* needs. Do you have questions or concerns that have not been answered? Please jot them down here. (use back of paper if needed.

- Greatly improved my knowledge
- looking forward to second session
- more time for Fred
- more about funding
- develop a list of companies
- great notebook; look forward to next session
- good materials in NB
- more on funding and legal issues
- look forward to second session; more on partnerships

Thank you for taking the time to complete this evaluation!

APPENDIX J

WorkNet
Capacity Building for Pennsylvania's
Workplace Literacy Provider Network

Training Session 2 Evaluation
April 4, 1995

Information on this evaluation form will help us determine whether the format and content of this training have been appropriate and effective. The last page will help us make recommendations to PDE for the future of the project.

1. *Prior to this training session,* how familiar were you with "fee-for-services" to support workplace literacy programs?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all familiar		Somewhat familiar		Very familiar
1	**3**	**6**	**4**	**0**

Average: 2.9

2. Briefly *state one important concept you learned* about "fee-for-services" during this training session.

- That your organization must be accountable for what is taught when you are charging a fee and that evaluation becomes very important
- The process for determining costs and setting fees and the importance of taking a business style approach.
- I never realized PDE funded organizations could use "fee for service" schedules. I also got a good feel for how to break things down.
- Don't underestimate costs
- Planning on contracts
- Company letterhead contract
- Transition form funding to fee for services. 1) measuring company productivity. 2) analysis of data
- The idea of being more selective in hiring people to teach in workforce lit projects was something I had not considered at any length.
- That it is feasible and growing and that contracts need to be thought through.
- Issues re: recovering $ when company personnel changes occur.
- Put disclaimers on the assessment test
- Tips to remember when setting up "fee for services" programs.
- Fee for service could permit me to give employers some of the specialized training they want that cannot be taught with PDE funds.
- I will have to pay for services that before I didn't.

3. *Prior to this training session,* how familiar were you with literacy task analysis (or its alternatives) for workplace literacy programs?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all familiar		Somewhat familiar		Very familiar
1	**1**	**6**	**6**	**0**

Average: 3.2

4. Briefly *state one important concept you learned* about literacy task analysis (or its alternatives) for workplace literacy programs during this training session.

- The short cuts to doing a literacy task analysis were very informative to me.
- Importance of getting information from different sources such as worker, supervisor, and management.
- Literacy task analysis is very definitely a collaborative effort involving all concerned parties.
- There are some options/shortcuts possible
- Workforce TABE
- Difficulty of assessment. Easy to administer
- The idea of not getting too detailed; instead stick to the big picture is good.
- The fundamentals of conducting an literacy task analysis
- Surveys as shortcuts
- Watch work being done over time to see various aspects of job.
- Various ways to accomplish task analysis
- This doesn't have to be such a high time-consuming task.
- I can do it myself- I don't necessarily need to contract this.

5. *Prior to this training session,* how familiar were you with the various assessment options for workplace literacy programs?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all familiar		Somewhat familiar		Very familiar
0	**2**	**6**	**3**	**3**

Average: 3.5

6. Briefly *state one important concept you learned* about workplace literacy assessment options during this training session.

- I learned the difference between curriculum based assessment and criterion referenced assessment.
- looking at assessments on a competency based perspective is being more valuable than many of the other options to learners and providers.
- The commonly used assessment tools are not appropriate for many workplace settings.
- I'm a reading specialist- I'm familiar with most assessments.

- Problems with evaluation of information. Making assessment match what needs to be learned.
- That the TABE has a workforce lit test; that using the vocabulary part of TABE is a better predictor than all of TABE
- That they must be specific to what you are teaching.
- Whose needs are being met by assessment choices.
- How to develop validity and reliability of teacher-developed tests.
- Combining assessment instruments/strategies.
- An "impact on organization" Assessment can be done a number of ways- supervisor interviews
- Reminders on how to establish validity and reliability of self-developed tests.

7. *Prior to this training session,* how familiar were you with program evaluation for workplace literacy?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all familiar		Somewhat familiar		Very familiar
1	**3**	**4**	**6**	**0**

Average: 3.0

8. Briefly *state one important concept you learned* about evaluating workplace literacy programs during this training session.

- I learned that many companies want to use this as pre-employment testing and a distinction must be made.
- Importance of evaluating the program from a variety of levels.
- Evaluation of workplace literacy programs should be done by the company, the employee and the instructors to get any kind of realistic data about the program.
- I've read a lot about evaluation of w.p. programs but I did find the TABE Voc. subtest used as a "predictor" of progress interesting.
- I'd like to get a copy of WonderLee. The vocabulary assessment seems very interesting.
- to be suspicious of supervisor's reports
- to help companies decide what they will track
- This went pretty fast. I didn't glean as much from this portion.
- Important that supervisor's recognize application of skills being used on the job.

9. *Prior to this training session,* how familiar were you with workplace literacy resources in the state and nationwide?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all familiar		Somewhat familiar		Very familiar
1	**3**	**6**	**4**	**0**

Average: 2.8

10. Briefly state one important workplace literacy*resource*you learned about during this training session.

- The computer information and how to access NWAC-L
- listservs and gopher services
- Internet, Literacy Task Analysis, Learning to learn
- Internet info
- The gopher resource available through Internet
- The gopher for NWAC
- That they are unlimited
- Internet info.
- Workplace TABE (ESL version)
- Gopher and listserv at PSU
- Internet listserv and gophers
- Several ideas on who I can contact for resource info.

11. How helpful were the speakers?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all helpful		Somewhat helpful		Very helpful
0	**0**	**0**	**6**	**8**

Average: 4.5

12. How *useful* were the topics covered in this training session?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all useful		Somewhat useful		Very useful
0	**0**	**1**	**4**	**9**

Average: 4.5

13. Overall, to what extent did this training session *meet your expectations*?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all		Somewhat		Completely
0	**0**	**1**	**6**	**7**

Average: 4.4

14. To what extent did this *project* adequately train you in all aspects of workplace literacy programs?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all		Somewhat		Completely
0	**0**	**3**	**9**	**2**

Average: 4.2

15. Will this training be useful for you in your work?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all		Somewhat		Completely
0	**0**	**2**	**7**	**5**

Average: 4.2

16. Do you think this project should be continued in some way?

1	2	3	4	5
❑	❑	❑	❑	❑
No		Unsure		Yes
0	**0**	**1**	**6**	**7**

Average: 4.4

17. How useful are the training materials (resource notebook)?

1	2	3	4	5
❑	❑	❑	❑	❑
Not at all		Somewhat		Completely
0	**0**	**0**	**3**	**11**

Average: 4.8

WorkNet

Options for the Future of the Project

1. Would you be willing to serve as a mentor for new workplace literacy providers in your region?

yes	maybe	no
❑	❑	❑
10	**2**	**1**

2. List the reasons why you responded as you did in question #1. Also, list the conditions you think should be present for you to serve as a mentor.

- Our region is so large I would need an easy way to reach everyone.
- I would be willing but feel that I would need more hands on experience for myself before serving as a mentor.
- I would really like to become much more involved with w/p literacy programs of all kinds.
- Telephone/ mail contact re: 1) adapting materials; 2) establishing fee for services
- Technical/ technology support
- Literacy councils, volunteer-based org. I have some experience setting up and designing programs in this area.
- I'd like to see other organizations work.
- I think I could "mentor" any of the programs in my region which want to get involved in a workforce literacy project. I will do so if its made part of my job requirements as a RSDC coordinator.
- I am still new but I would be happy to offer advise based on my experience at Corning.
- Without those individuals available to me when I started, I would have had to do a lot more learning by making mistakes. Also- I like the opportunity to gain from their experiences as well.
- I think experience is important and I have the experience. Conditions don't matter.
- Experience in workplace and training provided. Especially in assessment information.
- A project like this is worthless unless the participants are willing to carry what they've learned into their regions.
- My interest in workplace literacy is strictly for Penn Dot. With 12,000 employees statewide, it is all I can handle.

3. Which of these conditions for continuing this project is most important to you?

5 ❑ Adequate Funding

4 ❑ Need for Workplace Literacy Services in the Business Community

7 ❑ Need for Coordination and On-going Training of Workplace Literacy Providers in Pennsylvania

4. Would you like to receive more intensive training on any of these aspects of workplace literacy? Check any or all that apply.

9 ❑ Legal Issues of Workplace Testing

7 ❑ Adapting Existing Curricula

1 ❑ Working with Various Stakeholders

5 ❑ Marketing Workplace Literacy Services

7 ❑ Using Technology in Workplace Literacy Programs

2 ❑ Other **funding**

5. Please list any additional comments about this project and/or its future that you think should be noted in the final report.

- Priscilla- you did a great job with this workshop- I really learned a lot and enjoyed my two days at Penn State!

thank you

- Thanks for all your efforts! Thanks for the interesting speakers!
- Great job
- I really enjoyed being involved. Thanks!
- I'd be happy to work with ESL or multicultural training on workplace sites.
- Very helpful! An excellent program with positive results.
- This was very interesting and provided a very basic foundation of workplace. I look forward to the intermediate-level of this program.

Thank you for your participation!

APPENDIX K

1995 *WorkNet* Project

Fax-Back Follow-up Survey

Fax To: Priscilla Carman **Fax #** 814-863-6108

From:_____ **Fax #** _____

Directions: Please take a few minutes to answer these questions about the *WorkNet* project. The information you provide will help the project staff make recommendations for future workplace literacy capacity building efforts in the state. Thank you for your time.

1. After the training, did you make any contacts with potential local or regional workplace literacy partners, such as businesses or unions? If yes, please name.

2. After the training, did you provide any training or technical assistance to programs or providers in your region? If yes, please name.

3. Please describe any circumstances or situations in which you used the information or materials that were provided by the *WorkNet* training sessions.

4. Please describe any meetings or sessions in which you shared the training information or resource materials with others in your program or region.

5. What else do you think is needed to provide further coordination of workplace literacy efforts in the state?

APPENDIX L

☞ Workplace Literacy Program Technical Assistance Available

The Institute for the Study of Adult Literacy recently completed the *WorkNet* project, which was funded by a PDE Section 353 staff development grant to expand the state's workplace literacy provider and trainer network. Eighteen participants (representing the nine staff development regions) attended two five-hour training sessions at the Penn State University Scanticon Conference Center in February and April, 1995. Speakers from the education, business, and labor communities and the project participants discussed together the following topics:

- changes in the workplace and workforce
- organizations and agencies involved in workplace literacy
- how and why organizations should work together in new ways
- marketing workplace literacy services to businesses
- working with businesses and unions
- funding opportunities and fee-for-services
- curriculum and assessment options
- program evaluation.

Participants explored how their unique regional conditions frame these topics, what other people are doing in the state, and the resources available to them.

The *WorkNet* project staff developed a resource notebook, trainer's guide, and database of resource persons; all will be available through AdvancE and the Western Penn Adult Literacy Resource Center in September, 1995. A guide to the workplace literacy materials available in the resource centers also will be published in September.

Technical assistance is also available through the National Workforce Assistance Collaborative (NWAC) which was established with funding from the U. S. Department of Labor to help small and mid-sized businesses adopt high performance work practices, become more competitive, and create and retain high-skill, high-wage jobs for American workers. In addition, the collaborative helps service and information providers meet the needs of these businesses in four key areas: employee training, labor-management relations, work restructuring, and workplace literacy. For information about their products and services, contact Bernice Jones at **202-289-2915** or by e-mail at **Bernice_C._Jones@NAB.COM**

Finally, *WorkNet* participants are available to provide regional technical assistance to Pennsylvanians on a variety of workplace literacy issues and topics. For information, contact Priscilla Carman at **814-863-3777** or by e-mail at **psc3@psu.edu**

NIFL SPONSORS FOUR ISSUE-FOCUSED LISTSERVS ON INTERNET

The National Institute for Literacy (NIFL) has added a new feature to LINCS, their Literacy Information aNd Communication System. They have created four on-line discussion groups (listservs) to deal with issues critical to the literacy field — family literacy, learning disabilities, English as a Second Language, and workplace literacy. Each listserv is administered by one of the following four organizations in cooperation with NIFL: the National Center for Family Literacy (NCFL), the National Center for Adult Literacy and Learning Disabilities (NCALLD), the National Clearinghouse for Literacy Education (NCLE), and the Institute for the Study of Adult Literacy at Penn State. Staff of these organizations manage and facilitate on-line discussions on these listservs from their home sites.

By drawing on the resources of national centers that focus on each topic area, the four listservs offer opportunities for more and better-targeted communication about issues of growing concern to literacy practitioners, researchers and clients. NIFL sees this as the beginning of an information exchange network that will allow the field to share more easily and extensively about major issues in the field and urges you to join the on-line group or groups of your choice.

To participate in any of these listservs, all you need is an e-mail address. You can subscribe as follows:

1. send your request to: LISTPROC@LITERACY.NIFL.GOV

2. Use one of the following requests as your message, depending on the list you want to join:

    subscribe NIFL-Family firstname lastname

    subscribe NIFL-ALLD firstname lastname

    subscribe NIFL-WORKPLACE firstname lastname

    subscribe NIFL-ESL firstname lastname

Spell your first and last name exactly as you would like it to appear. There should be no other text in the message.

3. The listserv will send you a return mail message welcoming you to the NIFL subscription list for the particular discussion group.

Join NIFL and colleagues across the nation in exchanging thoughts and information about the literacy issues of greatest concern to you. Listservs are an important new vehicle for expanding your knowledge and professionalizing the field.

If you have any further questions, please contact Jaleh Behroozi at 202-632-1506.

NIFL-Family contact is Ronna Spacone at NCFL, telephone: 502-584-1133; email: NFLP@IGLOU.COM

NIFL-Workplace contact is Barbara Van Horn at the Institute for the Study of Adult Literacy, telephone: 814-863-3777; email: BLV1@PSU.EDU

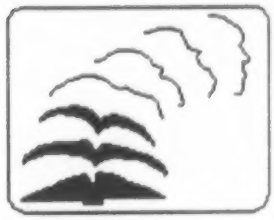
NIFL-ALLD contact is Eve Robins at NCALLD, telephone: 202-884-8185; email: EROBINS@AED.ORG

NIFL-ESL contact is Fran Keenan at NCLE, telephone: 202-429-9292; email: FRAN@CAL.ORG

WorkNet

Workplace Literacy

Trainer's Guide



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The contents of this trainer's guide were developed under a grant from the Pennsylvania Department of Education. However, the contents do not necessarily reflect the position or policy of the U.S. Department of Education or the Pennsylvania Department of Education, and no official endorsement by these agencies should be inferred.

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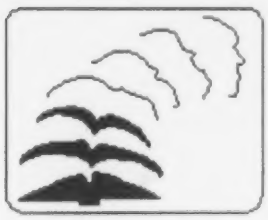
WorkNet

Workplace Literacy

Trainer's Guide



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Fiscal Year: 1994-1995

Contract #: 99-5036

ACKNOWLEDGMENTS

The *WorkNet* project staff would like to thank our trainers, Dr. Jerome Williams, Dr. Fred Schied, and Ms. Donna Cheatham for their presentations at Training Session #1. We would also like to thank the Regional Staff Development Centers and project participants for sharing their expertise, concerns, and materials; special thanks go to Ms. Sandra Choukroun (Center for Literacy), Ms. Cheryl Hiester (Lancaster/Lebanon IU#13), Ms. Michelle Joyce (Greater Pittsburgh Literacy Council), and Dr. Barbara Woodruff (Adult Education and Job Training Center) for sharing their expertise at the training sessions.

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About this Guide

The materials and resources in the *WorkNet: Trainer's Guide* are intended for anyone who provides training, information, or technical assistance to workplace literacy providers. This guide may be used with the materials in the *WorkNet: Resource Notebook* (available through the Pennsylvania state literacy resource centers) to build the broad background workplace literacy providers need in today's changing business world. Both the guide and the notebook were developed as part of *WorkNet*, a Pennsylvania Department of Education 353 project to build the state's workplace literacy provider network.

The *WorkNet* project sponsored two five-hour "train–the–trainer" sessions at Pennsylvania State University in February and April, 1995. Speakers from the education, business, and labor communities and the 17 project participants discussed together the many organizations and agencies involved in workplace literacy, how and why they might work together in new and creative ways, marketing workplace literacy services to businesses, funding opportunities, curriculum and assessment options, and program evaluation. Participants explored how their unique regional conditions frame these topics, what other people are doing in the state, and the resources available to them. This guide includes the experiences and information shared by participants and presenters at the training sessions, as well as other information and resources collected or developed by the project staff.

The training materials and resources in this guide are divided into six sections:

1) *Overview* – illustrates the need for workplace literacy programs (such as the changing workplace and the educational needs of its workforce) and provides introductory information about developing workplace literacy programs (such as program development steps and the elements of successful programs)
2) *Groundwork* – addresses how and why providers must market their services to the business community and funding options to support workplace literacy programs;
3) *Network* – provides information about building and maintaining effective partnerships and tips for working with businesses and unions;
4) *Literacy Work* – includes information about curriculum options, recruitment, assessing learners, and evaluating programs;
5) *Glossary* – defines terms and phrases commonly heard in workplace literacy programs;
6) *Resources* – comprehensive listing of newsletters, resource organizations, electronic resources, bibliography, curriculum resources, and a workplace literacy resource person database.

Sections 1–4 contain the following:

1) a background reading to introduce the topic;
2) lists of training materials in the guide and notebook;
3) suggested training activities and discussion questions;
4) suggested in-depth readings;
5) a series of one-page information sheets that may be made into overhead transparencies or photocopied as handouts for training; and
6) worksheets and checklists for training sessions.

Some general guidelines for using the *WorkNet* materials are:

- Consult the *Resource Notebook* for detailed or specific information, resources, training materials, and in-depth background reading on the topics; many of the resources in the notebook can be copied or made into overhead transparencies for training. Be sure to examine the National Workforce Assistance Collaborative (NWAC) products in the folder; they are specifically intended for workplace literacy program providers and small and mid-sized businesses.
- Use this *Trainer's Guide* for planning and conducting training sessions. For example, the overhead transparencies, worksheets, and training ideas are good resources to use with new trainees. For more in-depth training, supplement the activities with the suggested background readings, many of which are included in the *Resource Notebook*. Use the extensive listing of resources in the back of the guide. Emphasize with trainees the importance of using or adapting existing resources.

We suggest you periodically update the *WorkNet* materials as new ones are collected or existing ones become dated. In addition, the *WorkNet* project staff welcomes your input and suggestions. Use the perforated FAX-Back forms at the end of this guide to submit your suggestions. The blue form may be used to suggest additions or changes to the resource person database. The white form may be used to make comments, suggestions, or changes to the *WorkNet* materials.

Guide to the Acronyms

This page explains the acronyms used throughout the *WorkNet* and other workplace literacy materials. See the "Glossary" in Section 5 for more information about some of the terms.

ABLE	Adult Basic and Literacy Education
ASTD	American Society for Training and Development
BCEL	Business Council for Effective Literacy
CFL	Center for Literacy
EEOC	Equal Employment Opportunities Commission
ERIC	Education Resources and Information Clearinghouse
ESL	English as a Second Language
EQW	Educational Quality of the Workforce
EZ/EC	Empowerment Zone/Enterprise Community
GPLC	Greater Pittsburgh Literacy Council
HPO	High Performance Organization
IEP	Individualized Education Plan
ISAL	Institute for the Study of Adult Literacy
ISO	International Standards Organization
LTA	Literacy Task Analysis
NAB	National Alliance of Business
NALS	National Adult Literacy Survey
NCAL	National Center on Adult Literacy
NNCCTVE	National Network for Curriculum Coordination in Voc/Tech Education
NWAC	National Workforce Assistance Collaborative
NWLP	National Workplace Literacy Program
OH	Overhead (transparency)
ONA	Organizational Needs Analysis
PDE	Pennsylvania Department of Education
ROI	Return on Investment
SALS	State Adult Literacy Survey
SPC	Statistical Process Control
TQM	Total Quality Management
WPALRC	Western Pennsylvania Adult Literacy Resource Center
WS	Worksheet

Section 1: Overview

Need for Workplace Literacy Programs

By the year 2000, almost 6.3 million people will work in Pennsylvania. Who are these workers and what do they need to know for success in the workplace? What do workplace literacy educators need to know to meet their educational needs? What changes are taking place in the businesses and industries in Pennsylvania and around the country?

This section helps trainees explore answers to these questions; it provides resources and materials to illustrate the educational needs of adults in Pennsylvania, expected changes in the economic outlook and nature of work in the state, and the variety of organizations that are involved in workplace literacy programs.

In the State Adult Literacy Survey–SALS (Jenkins & Kirsch, 1994), more than 1600 adults age 16 and older were randomly chosen and assessed to represent the total adult population of 9.25 million Pennsylvanians. The survey assessed participants' ability to complete a variety of realistic tasks of varying degrees of difficulty (from Level 1–least difficult, to Level 5–most difficult). In the survey, nearly 50% of those tested scored in the lowest two levels of the assessment. These individuals may have accurately completed some tasks in the higher levels, but they were not able to do so consistently. The SALS data also revealed numerous statistically significant differences among the respondents, including economic status and work history. These data are especially alarming as forecasters predict that by the year 2000, nine-tenths of all the jobs in the "high performance" workplace of the future will require post secondary levels of reading, writing, and math (ASTD, 1993). Overheads (OHs) #1 and 2 illustrate selected education statistics.

Need

In the workplace, the Pennsylvania Department of Labor (1993) predicts a shift from a manufacturing to a service economy as well as an increase in the number of limited-English-speaking adults in its workforce. Smith (1993), in a survey of 167 Pennsylvania employers who had employed at least one ESL worker, found that the majority of respondents hired ESL workers in entry-level full-time jobs, mostly in the service industries. OHs #3 and 4 illustrate the economic outlook in the state. OHs #5 and 6 outline the major points of a "high performance workplace."

Much more can and should be done to meet the education needs of Pennsylvania's as well as the nation's workforce. For example, a U.S. Department of Labor survey (1994) revealed that fewer than 3% of American businesses were offering workplace literacy programs. At the same time, a Society for Human Resource Management–SHRM (1994) survey revealed that nearly half of SHRM organizations believe their unskilled or semi-skilled workers will probably need basic skills training in the next five years just to cope with the increased literacy demands in the workplace. In Pennsylvania, very few adult basic education programs provide customized workplace literacy services – only about 19% according to a recent survey of ABLE providers (Forlizzi & Askov, 1994). In addition, the survey revealed that of the 70,000 adults currently receiving adult education services, only about 3,000 (or 4.5%) are enrolled in workplace literacy programs.

Clearly, the need for workplace literacy programs is critical in the state. To meet this need, workplace literacy providers need a keen understanding of the total community picture, including the variety of organizations, funders, agencies, and individuals who are – or who might be – involved by providing resources, funding, facilities, equipment, advocacy, education services, and technical assistance. OH #7 illustrates many of these organizations.

Training Materials in this Section

- Overhead (OH) #1–2: Pennsylvania's Education Picture
- OH #3-4: Pennsylvania's Work Picture
- OH #5–6: High Performance Workplaces
- OH #7: Organizations Involved in Workplace Literacy

Related Training Materials in the *Resource Notebook*

- Information from National Adult Literacy Survey (NALS, 1993)
- Data from America 2000 Goals Report (1993)
- High Performance Workplace Information from NWAC
- ERIC Digests, Trends and Issues, and Minibibs
- Information from State Adult Literacy Survey (SALS, 1993)
- National Education Goals Data
- 1990 Census Data
- PA Workforce 2000 Information
- ABLE Survey Data
- Results of *Survey of Employers of ESL Adults in Entry-Level Jobs* (Smith, 1993)
- PA 2000 Adult Literacy Task Force (1994-1995)

Related Materials In Blue Folders

- *Pennsylvania: Civilian labor force series.*
- *Employment outlook in Pennsylvania industries and occupations: Estimated 1990 and projected 2000 employment.*

Training Ideas

Activities:

1. Using the list of organizations on OH #7 as a guide, ask trainees how many different organizations, individuals, or agencies they have worked with. Have them research and identify specific regional contacts under each example.
2. Make copies of the glossary in the back of this guide. Divide the whole group into small groups. Give each group one page of the glossary and have them create vocabulary building exercises to "quiz" each other.
3. Have trainees brainstorm possible changes in literacy requirements in a high performance workplace.

Discussion Questions

- What's the economic picture in your region?
- What workplace literacy programs are or have been in existence in your region?

- If programs are no longer in operation, why not?
- What do you think is needed to support workplace literacy programs in your region?
- Have you seen or heard of any changes in the workplaces in your community? Describe them.
- Do the changes reflect what we know about high performance workplaces?
- Have you seen any move toward a high performance workplace within your own organization?
- How do these changes affect the literacy requirements at work?

Suggested In-Depth Readings

The Education Picture

- Bassi, L. G. (1992). ***Smart workers, smart work: A survey of small businesses on workplace education and reorganization of work***. Washington, DC: Southport Institute for Policy Analysis.

Comprehensive report on a study of small and mid-sized businesses to identify percentage of firms engaged in work reorganization and workplace education. Includes statistical information and graphic illustrations of findings.

Contact: Southport Institute for Policy Analysis at 202-682-4100

- Forlizzi, L. A., & Askov, E. N. (1994). ***Research on current ABLE services and recommendations for achieving Pennsylvania 2000 Goal 6.*** University Park, PA: Institute for the Study of Adult Literacy, Penn State University.

Provides facts and graphic illustrations of the state survey ABLE services, such as numbers and kinds of organizations providing each type of service, number of students from each organization type, staffing and funding information, and methods of outreach for recruiting volunteers, learners, and public relations.

Contact: AdvancE at 800-992-2283 and WPALRC at 800-446-5607

- Jenkins, L. B. , & Kirsch, I. S. (1994). ***Adult literacy in Pennsylvania: Results of the state adult literacy survey***. Harrisburg, PA: Pennsylvania Department of Education.

Provides the results from Pennsylvania in the National Adult Literacy Survey and explores the connections between literacy and other factors such as 1) education and training; 2) employment, economic status, and civic responsibility; and 3) language use and literacy practices.

Contact: PA Bureau of Adult Basic Education at 717-787-5532

- Koppel, R. (1990). ***Pennsylvania employers' perceptions of workers' skills, abilities, and attitudes.*** Report to the Pennsylvania Occupational Information Coordinating Committee, Pennsylvania Department of Labor. Harrisburg, PA.

In a survey of Pennsylvania businesses, a majority reported discouraging deficiencies in the skills, abilities, and attitudes of young workers. Reading, writing, communication, and problem solving skills were reported to be a problem by about half the firms surveyed. Employers said only 57% of those who recently applied for work had the basic skills and abilities sought by their companies.

Contact: AdvancE at 800-992-2283 and WPALRC at 800-446-5607

• Mundie, L. & Joyce, M. (1994). ***Finding the missing link: Expanding the role of literacy councils in workplace education***. Pittsburgh, PA: Greater Pittsburgh Literacy Council.
Report on a project to develop a model for community-based literacy programs to get involved in workplace literacy education. Project staff surveyed upper and middle managers and employees of 20 small and mid-sized businesses in Pittsburgh. This document includes the survey, its results, the model, and recommendations.
Contact: AdvancE at 800-992-2283 and WPALRC at 800-446-5607

• Pennsylvania 2000 Adult Literacy Task Force. (1994). ***Call to action: Mobilizing for adult literacy (Executive Summary)***. Philadelphia, PA: Center for Literacy.
This report summarizes the actions proposed by the Pennsylvania 2000 Adult Literacy Task Force. Includes information and recommendations about the Pennsylvania Literacy Act, Funding, Workforce Education, Creating Public Awareness, and Technology Opportunities.
Contact: Center for Literacy at 215-474-1CFL.

• Pennsylvania Department of Labor and Industry. (1993). ***Governor's conference on workforce development*** (Conference Proceedings). Harrisburg, PA: Author.
Theme 3 in the proceedings addresses such topics as: "Who Will be the Pennsylvania Worker?"; "How can Schools Help PA's Workforce?"; "What can PA's Education System do to Prepare the Workforce?"; "How has Labor-Management Cooperation Helped PA Employers?"; and "What Can PA Businesses do to Become High Performance Organizations?"
Contact: AdvancE at 800-992-2283 and WPALRC at 800-446-5607

• Smith, B. (1993). ***Results of survey of employers of ESL adults in entry-level jobs***. Harrisburg, PA: Author.
Provides the results of a survey of 167 PA employers who hire ESL adults and makes recommendations for adult education agencies who work with that population. For example, recommendations include targeting full-time, entry-level jobs in service industries, stressing interview and worksite communication skills, and sending agency speakers to employers in the area to market their services.
Contact: AdvancE at 800-992-2283 and WPALRC at 800-446-5607

Pennsylvania's Education Picture

- 18-22% of the population scored in level 1 of State Adult Literacy Survey. 25-28% scored in level 2. **These figures represent almost four million Pennsylvanians.**

- Average proficiencies of employed adults differed sharply from those of adults who were unemployed or out of the labor force.

- Employed adults were much more likely to reach the highest literacy levels and much less likely to perform in the lowest levels.

OH #1

(from State Adult Literacy Survey SALS, 1994)

Pennsylvania's Education Picture

- Adults who performed consistently in the higher levels tended to work more weeks in the past year than those in level 1 and level 2. **The average number of weeks worked climbs steadily across the literacy levels.**

- Adults with higher literacy proficiencies were also likely to earn greater weekly wages than adults with more limited skills.

- Adults with incomes in the poverty level were much more likely to demonstrate limited literacy skills.

OH #2

(from State Adult Literacy Survey SALS, 1994)

Pennsylvania's Work Picture

- The growth of the labor force will slow considerably due to a decline in the youth population. That means **fewer young people will be trained for tomorrow's jobs and we will have a greater dependence on retraining older workers.**

- Most of the population growth in the state is accounted for by increased immigration of Hispanics, Asians, and other races and **many will have a variety of educational needs.**

- Small businesses (which represent more than 99% of all Pennsylvania's companies) will provide the economic backbone in the state. **Small businesses typically have fewer resources to support education and training on their own; providers may be working with a training consortium.**

OH #3

(Adapted from PA Department of Labor, 1993)

Pennsylvania's Work Picture

- More women will be present in the labor force, creating **an increased need for support services, such as child care and other family-related considerations.**

- Employment growth will be concentrated in the service-producing industries (such as health, business, social, retail) which means that **programs must emphasize the application and use of skills in social contexts.**

- An increased prevalence of sophisticated technology and computers in the workplace will demand that **all workers use higher levels of skills and be familiar with new technologies.**

OH #4

(Adapted from PA Department of Labor, 1993)

High Performance Workplaces

Production

- All workers are involved in improving quality
- Emphasis is on productivity and elimination of waste
- Focus is on customer satisfaction

Work Organization

- Participatory management style
- Decentralized organizational structure
- Work is done in self-managed teams
- Every worker's goal is to improve his or her part of the production process
- All workers are "on-the-spot" problem-solvers

OH #5

(Adapted from "*Workplace Literacy Training in Modernizing Manufacturing Environments*" by Haigler & Stein, 1994)

High Performance Workplaces

Role of Workplace Education

- Education and training part of continuum of lifelong learning opportunities
- Education's "return on investment" is *long term* goal
- No conflict exists between education and production

Development of Workplace Education Program

- Participatory planning, implementation, & evaluation
- Top management invested in program
- Curriculum is relevant to workplace and needs of work teams
- Testing is integrated into instruction

OH #6

(Adapted from "*Workplace Literacy Training in Modernizing Manufacturing Environments*" by Haigler & Stein, 1994)

Government (Federal, State, Local)

Departments of:

- Education
- Labor and Industry
- Public Welfare
- Commerce
- Community Affairs

Education

- School districts
- Intermediate units
- Literacy councils
- Community-based organizations
- Immigration assistance
- Corrections
- Vocational and technical schools
- Community colleges
- Higher education

Business-Industry-Labor

- Businesses
- Unions
- Economic development groups and consortia
- Private Industry Councils
- Chambers of Commerce
- Professional and service orgs (BPW, Rotary)
- Private trainers and consultants

Community

- Libraries
- Service organizations (Altrusa, Optimists)
- Churches
- Task forces and coalitions
- Media

Overview of Workplace Literacy Programs

People have been learning "for and in the world of work" for hundreds of years, but only in the past fifteen years has the concept of *workplace literacy* gathered momentum on a national scale. The U.S. Department of Education's National Workplace Literacy Program led the initiative by providing federal funds for job-related literacy programs developed through strong partnerships among educators, employers, workers, and unions. A key objective of these programs is to develop and implement a work-related education program that integrates literacy skills and job-related training. On a smaller scale, educational institutions, unions, consortia, and employers around the country provide similar programs with little or no federal assistance.

Developing a workplace literacy program at a local level can be challenging and labor intensive, especially for new providers. The success of a program depends on a variety of factors, including adequate funding and resources, the dedication of the individuals, and the ability of the project team to plan, implement, and design an effective program. Workplace education providers must balance the interests of all the players as they oversee the planning and implementation of the program.

This section provides training materials to introduce the "basics" of developing a successful workplace literacy program. (Subsequent sections of this guide cover the topics and information in greater detail and provide practical tips on the day-to-day processes involved in developing a program.) OH #8 on page 17 illustrates the steps that experienced workplace literacy program developers have identified over time and through trial and error. These steps are often adapted by different programs to meet a variety of needs; however, they provide a starting point for helping new providers understand the process of developing a workplace literacy program. OHs #9–11 outline key elements of successful programs. Again, even experienced providers will admit that it is difficult to incorporate all elements into a program; however, the key elements provide a goal for trainees to strive for as they develop and implement new workplace programs.

Overview

Training Materials in this Section

- OH #8: Workplace Literacy Program Development Overview
- OH #9–11: Elements of Successful Workplace Literacy Programs

Related Training Materials in the *Resource Notebook*

- ERIC Digests, Trends and Issues, and Minibibs

Related Materials In Blue Folder #1

- *The New American Workplace*
- *Foundations for a Competitive Edge*
- *Choosing the Right Training Program*
- BCEL Brief: *Basic Skills in Small Businesses*

Related Materials In Blue Folder #2

- NWAC Products

Training Ideas

Discussion Questions

- Does your organization already provide workplace literacy services? What have been your successes and challenges? How might you go about analyzing your organization's ability to provide workplace literacy services? What program components would you examine closely?
- What resources have you used to fund workplace literacy programs? Which have been the most lucrative?
- Have you ever been part of a project team? What are some of the challenges to working with a team on program development and implementation? What are the advantages?
- Why is it important to disseminate program information? Where would you look for information about existing workplace literacy programs and resources?

Activities

1. NWAC's Business Assistance Note #1 provides an overview of what businesses want from workplace literacy providers. Have trainees read the article and discuss their reactions and experiences.
2. Several video resources provide a good overview of workplace literacy programs. For example:

- *Project Lifelong Learning: The Workplace*

The *Project Lifelong Learning* package includes a documentary video featuring successful workplace and workforce programs around the country and two staff development videos describing strategies that program providers can use to ensure quality programming.

Contact: ISAL at 814-863-3777

• *A Literate Workforce: Meeting the Need*

Video portion to accompany the *Upgrading Basic Skills* manual. The video showcases eight successful Appalachian region workplace literacy programs.

Contact: ISAL at 814-863-3777

• *Success Ahead: Staff Development Video Training*

A half-hour video profiling three companies that have taken a lead in offering workplace literacy programs in Pennsylvania. Can be used with trainees who have little experience in developing partnerships with business.

Contact: AdvancE at 800-992-2283 and WPALRC at 800-446-5607

• *What Works: Literacy Training in the Workplace*

Staff development video conference addressing important issues in workplace literacy programs. Includes site visits to four workplace literacy programs .

Contact: National Center on Adult Literacy at 215-898-2100

•*Retraining the Workforce*

Set contains six 30-minute videos, training manuals, and facilitator's guide to marketing, identifying critical job tasks, conducting literacy task analyses, designing training, implementing, and measuring program effectiveness.

Contact: Le Croy Center for Educational Communications at 214-952-0332

Suggested In-Depth Readings

• Askov, E. N., Aderman, B., & Hemmelstein, N. (1989). ***Upgrading basic skills for the workplace***. University Park, PA: Institute for the Study of Adult Literacy, The Pennsylvania State University.

Useful resource to help literacy providers and trainers develop and market a workplace literacy program. Includes sample instructional activities, needs assessment questionnaire, basic skills lists, readability formula, assessment and evaluation materials, and promotional materials.

Contact: ISAL at 814-863-3777

• Carnevale, A. P., Gainer, L. J., & Meltzer, A. S. (1990). ***Workplace basics training manual.*** San Francisco, CA: Jossey-Bass.

A step-by-step manual for establishing workplace basic skills training, including building support, identifying basic skills problems in the workplace, and evaluation. Includes a sections on determining program development cost and time estimates.

Contact: Jossey-Bass at 215-433-1767

• Gordon, E. E., Morgan, R. R., & Ponticell, J. A. (1994). ***Futurework: The revolution reshaping American business***. Westport, CT: Praeger.

Authors discuss applications of a cognitive training approach to improve thinking, problem solving, and comprehension in workplace training program; also present arguments for the use of such an approach in a restructured workplace.

Contact: Praeger (now Greenwood) at 800-225-5800

• Mikulecky, L, Henard, D., & Lloyd, P. (1992). ***A guidebook for developing workplace literacy programs.*** Indianapolis, IN: Office of Workforce Development, Indiana Government Center.

Guides service providers in developing workplace literacy programs. Provides practical advice and guidelines for: 1) assessing training needs; 2) conducting literacy task analyses; 3) developing customized instruction; 4) delivering instruction to target groups; and 5) evaluating the program's effects.

Contact: Indiana Government Center at 317-233-3354

• Philippi, J. (1991). ***Literacy at work: The workbook for program developers.*** New York: Simon & Schuster and the National Alliance of Business.

An excellent, although expensive, resource for workplace literacy program developers and practitioners. Philippi gives the reader step-by-step guidelines for using work-related materials to teach basic skills, with special emphasis on the thinking and reasoning strategies learners need to use the skills in a variety of situations.

Contact: Simon & Schuster at 212-245-6400

• U. S. Department of Education, Office of Vocational and Adult Education. (1992). ***Workplace literacy: Reshaping the American workforce***. Washington, DC: Author.

Describes the National Workplace Literacy Program. Provides program elements of five exemplary projects to illustrate the attributes of successful programs. Includes contacts.

Contact: U.S. Department of Education at 202-205-9872

• Waugh, S. (1992). ***An organizational approach to workplace basic skills: A guidebook for literacy practitioners.*** Ottawa, ON: Ottawa Young Men's and Young Women's Christian Association.

Concisely written guide for literacy practitioners working with business and industry. Includes chapters on mapping the community and marketing services, building partnerships, conducting an organizational needs assessment, developing a plan, and designing an evaluation strategy.

Contact: Ottawa YMCA at 613-788-5001

Workplace Literacy
Program Development Overview

Step 1: Analyze your Services

Step 2: Market your Services

Step 3: Obtain Funding

Step 4: Develop the Program

- Establish Project Team
- Assess Needs
- Set Goals and Objectives
- Design, Develop, & Revise Program
- Recruit Workers

Step 5: Implement the Program

Step 6: Evaluate the Program

Step 7: Disseminate Program Information

OH #8

Elements of Successful Workplace Literacy Programs

Project Team

- All project stakeholders (providers, employers, workers, labor, Advisory Council) are active and involved in all phases of the program.

- The program is openly supported by the union, supervisors, and management.

- The program has clearly defined, realistic goals and objectives that all stakeholders agree on.

Program Design

- The program is one component of a lifelong learning program consisting of a variety of training, education, and upgrading opportunities.

- The program minimizes barriers to participation with support services such as child care, convenient scheduling, and counseling.

Elements of Successful Workplace Literacy Programs

Curriculum and Instruction

- The curriculum emphasizes materials and activities that develop skills relevant to the workplace. Skills are discussed as they relate to the context of the total organization.

- Schedule at least 50-100 hours of instruction for an average learner gain of one year.

- Instruction meets the needs of individual learners via a variety of delivery systems and instructional approaches.

- Instructional approaches build on the existing skills and knowledge of workers. Diversity is respected.

- Instruction emphasizes "transfer" of skills to the job. Support learners as they practice using skills in class and on the job.

- Participants understand how skills taught in the program apply on the job and in their lives. Participants understand the need for and value of learning.

Elements of Successful Workplace Literacy Programs

Assessment and Evaluation

- Assessment instruments provide a variety of relevant information and progress is monitored continuously throughout the program.

- Assessment and evaluation methods relate to the goals and activities of the project.

- Expected project outcomes are stated up front, at the beginning of the project.

Dissemination

- Project partners are advocates for workplace literacy programs in the community and business world.

- Success stories are shared with others in the business and education communities.

Section 2: The Groundwork

Marketing Workplace Literacy Services

Workplace education providers must be skilled communicators in the business world. They must be able to clearly convince workers, labor, and management of the benefits of workplace education programs. For example, in *The Missing Link* (based on a comprehensive 18 month national study of formal employer-sponsored basic skills programs in small and medium-sized firms), Chisman (1992, p. 90) reported:

> Workplace education cannot grow and prosper unless suppliers make a stronger effort to enlist firms. Most employers in small companies do not know how to think about workplace education. They do not know how serious a problem they have, where to look for help and what options are available to them. This information gap is the missing link in the workplace education system. Unless suppliers make an effort to forge it, workplace education will fall short of its potential.

Marketing theory provides relevant concepts and a framework to guide education providers who market their workplace services. In general, marketing means assessing the needs of a market and then meeting those needs with a product or service. Marketing literacy services means assessing the *need* (educational opportunities/trained workers) of a *market* (the business/industry/labor community) and then effectively and efficiently meeting those needs with a product or *service* (workplace literacy programs). Experienced providers report that marketing is most likely to be successful when labor and management are "ready" for the information. For example, Knell & Geissler (1993, p. 21) report the following on a two year study of Illinois businesses conducted by the Illinois Literacy Resource Development Center:

> The provider's "sales effort" is made much easier if several other factors are in place. Clearly, the employer must be aware of the basic skills problem or at least be willing to entertain the notion that his or her work force may need some assistance in brushing up on basic skills. It also helps if the employer and educational provider have a previously established relationship. And in the end, if the education package is inexpensive enough, the employer may be willing to give it a chance.

The materials in this section help trainees understand the basics of a marketing campaign. OHs #12-15 illustrate the basic steps of a marketing approach and provide general marketing tips. The worksheets (pages 29-32) help trainees lay the groundwork for their own organization's marketing campaign. The checklist (page 33) guides trainees in practicing a marketing presentation.

Marketing

Training Materials in this Section

- OH #12: Marketing Steps
- OH #13-14: Marketing Tips
- OH #15: Brochure Tips
- Worksheet (WS): Organizational Capacity (pp. 29-30)
- WS: Marketing Analysis (pp. 31-32)
- WS: Marketing Presentation Checklist (p. 33)

Related Training Materials in the *Resource Notebook*

- Pennsylvania 2000 Adult Literacy Task Force Marketing Pieces
- Greater Pittsburgh Literacy Council (1994): *Workplace Literacy Experiences and Recruitment Plan* (see Objectives 3-6 for marketing suggestions)
- *Finding the Missing Link* (Mundie & Joyce, 1994)
- Center for Literacy Workplace Literacy Marketing Pieces
- ABLE Survey Marketing Data

Training Ideas

General Discussion Questions

- How is marketing workplace literacy services different from other kinds of marketing, such as marketing new automobiles?
- Is it the responsibility of literacy providers to market the idea of workplace education to the business/industry/labor community? Why or why not?
- What are some challenges to marketing an educational service?
- What kind of time commitments are involved in a marketing campaign? Is the time available to you and your organization?
- What kind of resources (money, support) are needed? Can your organization tap into them?
- Who within your organization should be responsible for marketing?

Activities and Related Discussion Questions

1. Have trainees fill out *Organizational Capacity Worksheet* (on pages 29-30) individually or in small groups if they are from the same program. Discuss these questions:
   - Is your organization capable of efficiently and effectively providing workplace programs?
   - What are the strengths of your workplace literacy program? How can you emphasize them?
   - Which program components should be improved before marketing?

2. Have trainees fill out *Market Analysis Worksheet* (on pages 31-32) and discuss these questions.
   - Is there a need for workplace literacy programs in your region? How do you know?
   - Which segment of the market will you target? Why?
   - Do you have any established links with business and industry?

3. Suggest that trainees call other organizations in their region to find out what kind of marketing plan they have.

4. Discuss the following questions to help trainees consider and write objectives for their own marketing plan:
   - From your analysis of your own organization and market, what program features are strengths? Which are weaknesses?
   - Should you place more emphasis on selling your services or selling the "idea" of workplace literacy? What are your reasons?
   - Who is your target audience? On which specific sector of the market will you focus? What benefits will they gain by participating?
   - What steps do you need to take to accomplish each objective?
   - Are your plans realistic given your organization's capabilities?
   - Are your objectives specific as to the results sought?
   - What advantages or services can you offer that other providers can not?

5. Have trainees design a brochure based on OH #15 and sample marketing pieces.

6. Discuss the *Marketing Presentation Checklist* (page 33). Have trainees use samples from the Resource *Notebook* or their own materials to practice making a presentation.

7. Brainstorm ways in which you would evaluate a marketing plan, including the kinds of information you would want to collect. Then, have the group make a sample form for an organization to use. The form should include ways to:
   - Keep track of dates and the number of calls the plan generates.
   - Keep track of requests for assistance.
   - Keep track of new contracts and presentations.
   - A way to evaluate the organization's capabilities for continuing a marketing plan.

Suggested In-Depth Readings

• Aurand, T. (1994). Segmenting the adult education market. ***Adult Learning, 5*** **(3),** 16-18. Describes market segmenting and how it can be used by adult education programs to reach students and provide programs that are educationally and financially successful.

Marketing

• Kotler, P., & Andreason, A. R. (1991). ***Strategic marketing for nonprofit organizations.*** Englewood Cliffs, NJ: Prentice Hall.

Includes information about basic marketing principles and concepts. Provides practical information and ideas that could be adapted by workplace literacy providers.

Contact: Prentice Hall at 201-592-2000

• Kotler, P., & Fox, K. (1995). ***Strategic marketing for educational institutions (2nd. ed.).*** Englewood Cliffs, NJ: Prentice Hall.

Part of the Prentice Hall Marketing series. This new edition is an excellent resource that can be adapted by literacy organizations that offer workplace literacy services. Includes information about fundraising, planning and conducting marketing of education services.

Contact: Prentice Hall at 201-592-2000

• Illinois Literacy Resource Development Project–ILRDP. (1989). ***Task force #1: Marketing contractual literacy services to business***. Champaign, IL: Author.

This publication is the first of a series in a compilation of materials from workplace literacy programs in Illinois. This manual provides sample materials in program planning, marketing, sample contracts, and needs assessment.

Contact: ILRDP at 800-252-1108

• Mundie, L. & Joyce, M. (1994). ***Finding the missing link: Expanding the role of literacy councils in workplace education***. Pittsburgh, PA: Greater Pittsburgh Literacy Council.

Report on a project to develop a model for community-based literacy programs to get involved in workplace literacy education. Project staff surveyed upper and middle managers and employees of 20 small and mid-sized businesses in Pittsburgh. This document includes the survey, its results, the model, and recommendations.

Contact: AdvancE at 800-992-2283 and WPALRC at 800-446-5607

• Waugh, S. (1992). ***An organizational approach to workplace basic skills: A guidebook for literacy practitioners.*** Ottawa, ON: Ottawa Young Men's and Young Women's Christian Association.

Concisely written guide for literacy practitioners working with business and industry. Includes chapters on mapping the community and marketing services, building partnerships, conducting an organizational needs assessment, developing a plan, and designing an evaluation strategy.

Contact: Ottawa YMCA at 613-788-5001

• Wilbur, R. H., Finn, S. K., & Freeland, C. M. (Eds.). (1994). ***The complete guide to nonprofit management.*** New York: John Wiley & Sons, Inc.

Includes chapters with practical advice on fundraising, marketing the organization and its services, providing educational services, and using public relations tool. Good resource for providers interested in expanding and marketing their services.

Contact: John Wiley & Sons at 908-469-4400

Marketing Steps

- Analyze your services
- Analyze the market
- Develop marketing objectives and marketing plan
- Develop marketing kit
- Implement marketing plan
- Evaluate marketing plan

Marketing Tips

- Know the titles and names of various contacts within the various business, labor, and community organizations.

- Send out a simple survey, include a brochure, and follow up with a phone call.

- Identify a business with a history of offering training for all employees (not just for management). Contact the human resource person and arrange a meeting to discuss workplace literacy services.

- Review existing marketing materials and use if appropriate.

- Send speakers to local business organizations, companies, and task forces.

OH #13

(Based on ideas in "*Finding the Missing Link*" by Mundie & Joyce, 1994)

Marketing Tips

- Attend business conferences; work with trade and professional associations. Participate in trade fairs.

- Work with union representatives; offer to speak at a meeting.

- Publish a newsletter or press release of success stories.

- Develop public service announcements or creative ad schemes; appear on business-oriented cable programming.

- Keep trying!

OH #14

(Based on ideas in "*Finding the Missing Link*" by Mundie & Joyce, 1994)

Brochure Tips

Design a brochure that:

- ☐ reflects the diversity of your community
- ☐ doesn't use too many statistics
- ☐ avoids focusing on "deficiencies" of workers
- ☐ makes only promises you can keep
- ☐ doesn't crowd the page with too much information
- ☐ uses lots of white space
- ☐ highlights important information
- ☐ uses terms and ideas that businesses understand.

Organizational Capacity Worksheet

Analyze your organization's capacity for providing workplace literacy services. Put a check in the box that accurately describes each aspect of your program.

Previous Workplace Literacy Experience

Strong		Not Sure		Weak
❑	❑	❑	❑	❑
1	2	3	4	5

Workplace Literacy Mission Statement

Strong		Not Sure		Weak
❑	❑	❑	❑	❑
1	2	3	4	5

Professional Image

Strong		Not Sure		Weak
❑	❑	❑	❑	❑
1	2	3	4	5

Current Marketing Plan

Strong		Not Sure		Weak
❑	❑	❑	❑	❑
1	2	3	4	5

Staff (available, trained)

Strong		Not Sure		Weak
❑	❑	❑	❑	❑
1	2	3	4	5

Flexibility (ability to offer a variety of program options)

Strong		Not Sure		Weak
❑	❑	❑	❑	❑
1	2	3	4	5

Capacity for Growth

Strong		Not Sure		Weak
❑	❑	❑	❑	❑
1	2	3	4	5

Access to Resources (funding, technical, support)

Strong		Not Sure		Weak
❑	❑	❑	❑	❑
1	2	3	4	5

Strength of Previous Workplace Literacy Partnerships

Strong		Not Sure		Weak
❑	❑	❑	❑	❑
1	2	3	4	5

Communication among Partners

Strong		Not Sure		Weak
❑	❑	❑	❑	❑
1	2	3	4	5

Curriculum/Assessment Planning and Development

Strong		Not Sure		Weak
❑	❑	❑	❑	❑
1	2	3	4	5

Delivery of Instruction (ability to provide variety and meet diverse needs)

Strong		Not Sure		Weak
❑	❑	❑	❑	❑
1	2	3	4	5

Program Evaluation (team approach, involves all stakeholders)

Strong		Not Sure		Weak
❑	❑	❑	❑	❑
1	2	3	4	5

Market Analysis Worksheet

The following questions will help you explore various aspects of the business, industry and labor sector of your community. Use the PA Department of Labor publications, *Employment Outlook in Pennsylvania Industries* and *Occupations and Civilian Labor Force Series*, to help you answer questions 3–5 and 7.

1. Who are the major employers and what product or service do they offer?

2. How large are the organizations (large, medium, small)?

3. Has your region lost or gained jobs in the past few three years?

4. What job loss or gain is projected in the next three years?

5. Which occupational areas are expected to grow in the next five years?

6. Do workers have union representation?

7. What is the overall makeup of the local workforce (women, minorities, ESL, dislocated, disabled, older)?

8. Do firms have current workplace education or other training programs?

9. Which employers are members of literacy task forces or coalitions?

10. Which businesses are most likely to respond positively?

11. What do you think will be the challenges of working with businesses in your region?

12. Do you have contacts for any of the organizations, such as the name of the training director, Human Resource Director, Personnel Director or CEO?

13. What other community organizations, agencies, or individuals are involved in workplace literacy, such Private Industry Councils or Economic Development Consortia?

14. What else do you need to know?

15. Where can you find more information?

Marketing Presentation Checklist

Before:

- ❑ Learn as much as you can about the business, including names, titles, and history of the organization.
- ❑ Anticipate their questions and concerns.
- ❑ Customize your marketing kit for that organization.
- ❑ Prepare your materials and rehearse your presentation.

During:

- ❑ Give an overview of your presentation.
- ❑ Provide an overview of your services.
- ❑ Show samples of your proposals, curricula, and assessments.
- ❑ Discuss their needs and objectives.
- ❑ Discuss resources, commitment, and responsibilities.
- ❑ Discuss funding options and potential partners.
- ❑ Check frequently for clarification or questions.
- ❑ Open up the discussion to questions and concerns.
- ❑ Summarize the presentation; offer to speak at a meeting.
- ❑ Leave a packet of information with your card.

After:

- ❑ Reflect on and discuss the presentation with coworkers.

  What would you do differently? the same?

  What unexpected questions came up?
- ❑ Make follow-up contacts (phone call, letter, meeting).

Funding for Workplace Literacy Programs

Workplace literacy providers have a number of funding options, including federal and state grant money and financial support from foundations, unions, and corporations. Many of these sources, however, are trimming budgets and allocating funds in new ways. In addition, each region has a unique business and industry community; some have thriving local economies while others are struggling with large numbers of layoffs and dislocated workers. All of these factors impact workplace literacy providers who must search for funding opportunities and be aggressive in obtaining them.

Recent data suggest that employers may be willing to support programs, although providers must be more creative in getting them to do so. For example, in *The Missing Link,* based on a comprehensive 18 month national study of formal employer-sponsored basic skills instruction in small and medium-sized firms), Chisman (1992, p. 90-92) reported:

> Case study and other evidence suggests that, once they are convinced of the importance of a program, many small firms would pay far more to support it than they do. Suppliers are often reluctant to ask them to pay more. Perhaps this is because they are accustomed to working within institutions that provide most educational services free. Or it may be that they are accustomed to thinking of education as a benefit to the individuals served, rather than a benefit to firms. Also educators may be afraid of driving away business.

Pennsylvania employers appear equally willing to fund workplace literacy programs. For example, in a survey conducted by Mundie and Joyce of the Greater Pittsburgh Literacy Council (1994), approximately 20 upper and 12 middle managers of 20 businesses in the Pittsburgh region responded as follows:

Would you pay for basic skills training?
Upper management: 14=yes (4 said if saw need first); 5=no; 1=not sure
Middle management: 10 said yes; 2=no
How much would you be willing to pay?
Upper management: (not specified, but said they would negotiate the fee)
Middle management: yes=2 (75% of cost); negotiable=10

Funding

Current funding sources for Pennsylvania's workplace literacy programs is varied. Several workplace literacy programs are supported by Pennsylvania Department of Education grant money. For example, 60 of the 320 (19%) organizations responding to the ABLE Survey reported that they provide customized basic skills instruction for work, although it is unclear what funding streams (353, 143) support those services (Forlizzi & Askov, 1994). These programs may find it difficult to obtain funding for these services in the future as state and federal monies are targeted to other services, such as workforce preparation programs.

Several programs in the state have federal funding. Pennsylvania College of Technology and Outreach in Williamsport has current funding from the National Workplace Literacy Program. Philadelphia and Lock Haven have federal funding from the Empowerment Zone/Enterprise Community program. Although these programs provide long-term funding, the future of these federal programs beyond this funding cycle is uncertain.

The Center for Literacy in Philadelphia provides workplace literacy services to small and mid-sized businesses with a grant from The PEW Charitable Trusts. Other programs, such as the Lancaster/Lebanon IU #13 and the Adult Education program of the State College Area School District, have successfully obtained fee-for-services contracts with regional businesses. In addition, approximately 40 organizations who responded to the ABLE survey receive corporate funding of some kind, although for what it is earmarked is unspecified (Forlizzi & Askov, 1994).

Although most local literacy and adult basic education programs provide work-related education opportunities of some kind, few have the resources, staffing, and funds to develop customized curricula to meet the unique and varied needs of area businesses. The materials in this section prepare trainees to tap into the cutomized workplace literacy program market.

Training Materials in this Section

- OH #16: Funding Options
- OH #17: Tips for Determining Contract Costs
- OH #18: Fee-For-Services Example
- Fee-For-Services Worksheet (p. 43)

Related Training Materials in the *Resource Notebook*

- PA 2000 Adult Literacy Task Force: *Inventory of Funding for Adult Basic and Literacy Education Programs*
- ABLE Survey Funding Data
- Sample Proposal and Cost Estimate
- Return on Investment
- PA Economic Development Partnership Business Assistance Programs Matrix
- BCEL Bulletin: *Make it Your Business: A Corporate Fundraising Guide for Literacy Programs*

Training Ideas

Discussion Questions

- Whose job is it in your literacy organization to secure funding for workplace literacy programs?
- How does the funding agent control the workplace literacy program? Who "owns" the final product?
- Should smaller, volunteer literacy councils charge for workplace literacy services? If so, which formula is most appropriate?
- Should providers "press harder" for funding from employers? If so, how can they do so diplomatically?
- Is it the literacy provider's job to let employers know about funding options/tax credits/loan programs ?

Activities

1. OHs #16 and 17 give trainees an overview of funding opportunities. Discuss how trainees would approach the different sources and how their organizations would handle increased requests for workplace literacy services.

2. Discuss OH #18. Have trainees work through the sample fee-for-services worksheet. Adapt the formula for different size businesses and existing and non-existing curriculum materials.

Suggested In-Depth Readings

• Carnevale, A. P., Gainer, L. J., & Meltzer, A. S. (1990). ***Workplace basics training manual.*** San Francisco, CA: Jossey-Bass.
A step-by-step manual for establishing workplace basic skills training, including building support, identifying basic skills problems in the workplace, determining program development cost and time estimates, and evaluation.
Contact: Jossey-Bass at 215-433-1767

• Flanagan, J. (1992). ***The grassroots fundraising book–How to raise money in your community.*** New Market, TN: Highlander Research and Education Center.
Includes field-tested and proven money-making ideas, the basics of organizing special events, and advice on approaching organizations.
Contact: Publisher at 1959 Highlander Way, New Market, TN 37820

• Illinois Literacy Resource Development Project–ILRDP. (1989). ***Task force #2: Increasing individual donations.*** Champaign, IL: Author.
This publication is the 2nd of a series in a compilation of materials from workplace literacy programs in Illinois; it covers the needs of and general resources available to programs in Illinois. Includes principles and concrete ideas for fundraising.
Contact: ILRDP at 800-252-1108

• Illinois Literacy Resource Development Project–ILRDP. (1989). ***Task force #3: Increasing corporate/foundation support.*** Champaign, IL: Author.
This publication is the third of a series in a compilation of materials from workplace literacy programs in Illinois. This manual provides step-by-step strategies for increasing foundation and corporate support for programs in Illinois; includes sample proposals and follow-up activities.
Contact: ILRDP at 800-252-1108

• Klein, K. (1985). ***Fundraising for social change***. New Market, TN: Highlander Research and Education Center.
Provides guidelines to establish, maintain and expand community-based fund-raising programs, so programs can move away from reliance on foundations and government programs.
Contact: Publisher at 1959 Highlander Way, New Market, TN 37820

• Marano, C. (1992). ***A road map to funding: Finding the resources for teaching literacy in context***. Washington, DC: Wider Opportunities for Women, Inc.
This handbook illustrates how to find resources to create a new program, add a program element, or strengthen their service delivery. Provides do's and don'ts based on their experiences.
Contact: Wider Opportunities for Women at 202-638-3143

• New Readers Press. (1993). ***Corporate and foundation fundraising***. Syracuse, NY: New Readers Press
Ideas and samples for proposals, cultivating potential donors, writing a proposal, and recruiting.
Contact: New Readers Press at 800-448-8878

• New Readers Press. (1992). ***Practical fundraising ideas.*** Syracuse, NY: New Readers Press. Offers overviews of successful fundraising projects developed by local volunteer literacy programs and helps you choose the right fundraising approach.

Contact: New Readers Press at 800-448-8878

• Philippi, J. (1991). ***Literacy at work: The workbook for program developers.*** New York: Simon & Schuster and the National Alliance of Business.

An excellent, although expensive, resource for workplace literacy program developers and practitioners. Includes a section on program development cost and time estimates.

Contact: Simon & Schuster at 212-245-6400

Funding Options

- Federal and state money
- Union support
- Private funding
- Volunteer services
- Fee-For-Services

Tips for Determining Program Costs

- Negotiate the funding early in the discussion.

- Discuss all potential costs (staffing, materials development or acquisition, travel, and individual consultations with workers).

- Identify potential curriculum and assessment resources and materials. Determine the extent you will need to create new materials. Be sure to negotiate the difference.

- Price program components separately, such as pre-training, training, and post-training.

- Make employers aware of tax credit programs and other organizations that may provide financial and technical support, such as the Small Business Administration, local consortia, or technical assistance programs like PENNTAP.

Fee - for - Services Example

Proposal to Company for Customized Workplace Curriculum
(Based on $35 per hour and 350 employees)

Pre-Training		
• Task analysis	50 hrs.	$1,750
• Develop Curriculum & Assessments	200 hrs.	$7,000
• Pre-Testing	80 hrs.	$2,800
• Individual Consultations	40 hrs.	$1,400
	Total:	$12,950
	Cost per Employee:	$37
Training		
• Training/Instruction	24 hrs/48 weeks	$40,320
	Cost per Employee:	$150.20
Post-Training		
• Program Evaluation	25 hrs.	$875
	Cost per Employee:	$35

Average Total Program Cost per Employee: $47

OH #18

(Developed by Cheryl Hiester, Lancaster/Lebanon IU #13)

Fee - for - Services Worksheet

Proposal to Company for Customized Workplace Curriculum

(Based on _____ per hour and _____ employees)

Pre-Training

- Task analysis ___ hrs. $_____
- Develop curriculum/ and assessments ___ hrs. $ _____
- Pre-Testing ___ hrs. $ _____
- Individual Consultations ___ hrs. $ _____

Total: $ _____

Cost per Employee: $ _____

Training

- Instruction ___ hrs/ ___ wks $ _____

Cost per Employee: $ _____

Post-Training

- Program Evaluation ___ hrs. $ _____

Cost per Employee: $ _____

Average Total Program Cost per Employee $ _____

(Developed by Cheryl Hiester, Lancaster/Lebanon IU #13)

Section 3: The Network

Building and Maintaining Partnerships

The success of a workplace literacy program depends on a strong team made up of representatives of all the key players, including educators, employers, unions, workers, and representatives from various community agencies, such as consortia, private industry councils, or chambers of commerce. The strength of this team comes from the dedication and energy that each individual and organization contributes to the partnership. Workplace literacy providers are often called upon to lead the team to achieve its goals as well as balance the interests of and facilitate communication among the key players. This section provides materials to help new providers function effectively in that role.

OHs #19 and 20 illustrate strategies for starting and building an effective workplace literacy program partnership. OH #19 includes tips for laying the groundwork for a strong partnership, such as setting goals and objectives, deciding how the key players will work together, and setting up leadership, communication, and decision making mechanisms. OH #20 provides tips for maintaining the partnership throughout the project.

As a team leader, workplace literacy providers must also be aware of the potential pitfalls or barriers to an effective partnership. Conflict among team members is the most common threat to the productivity of a team. Conflict may arise for a variety of reasons, such as competition among the members, the perception that one individual or agency has more responsibility or power, or unclear procedures for conflict resolution and decision making. OH #21 illustrates the barriers to effective partnerships. Worksheets #1, 2 and 3 (pages 52-54) provide activities to avoid some of these barriers.

Partnerships

Training Materials in this Section

- OH #19–20: Tips for Building Successful Partnerships
- OH #21: Barriers to Effective Partnerships
- Building Partnerships Worksheet #1: Speaking the Same Language (pages 51-52)
- Building Partnerships Worksheet #2: Resources, Roles, and Responsibilities (page 53)
- Building Partnerships Worksheet #3: Resovling Team Conflict (page 54-55)

Related Training Materials in the *Resource Notebook*

- *Keys to Coordination*
- *Guidelines for New Partners*
- *Tips on Coalition Building*

Related Materials In Blue Folders

- NWAC *Business Assistance Note #1*
- *Foundations for a Competitive Edge* (Illinois Resource Development Center, 1995)

Training Ideas

Discussion Questions

- In what kinds of partnerships have you or your organization been involved? What are the advantages in a partnership? What are the challenges?
- What kinds of conflict did the partnership experience? How were they solved?
- What do you think is the cause of competition among partners? lack of communication? lack of commitment or dedication to the partnership?
- What kinds of strategies work best for responding to the barriers listed on OH #21?

Activities

1. Use Worksheet #1 (pages 52) to discuss the importance of everyone on a team "speaking the same language" and as a springboard for discussing group communication strategies.
2. Use Worksheet #2 (page 53) to help trainees explore the various roles and resources that each team member agency or individual brings to the partnership.
3. Discuss trainees' responses to Worksheet #3 (page 54-55). In addition, make trainees aware of the resources (see Ohio State University's *Coalition Building* series) that they can use as team leaders of workplace literacy partnerships.

Suggested In-Depth Readings

- Alamprese, J. A. (1994). Strategies for building collaborative relationships and articulated programs. In ***Transitions: Building partnerships between literacy volunteer and adult education programs.*** Washington, DC: U. S. Department of Education and the National Alliance of Business.

This paper discusses three strategies that promote effective collaboration among agencies. Although the topic addresses client transition among programs, the strategies and principles may be adapted by workplace literacy program providers.

Contact: U.S. Department of Education at 202-205-9872

• Haigler, K. O. (1990). Building ties among literacy programs: Achieving strength through cooperation. In F. P. Chisman and Associates, ***Leadership for literacy: The agenda for the 1990s*** (pp.51-71). San Francisco: Jossey-Bass.
This chapter describes networking and collaboration to provide for those most in need of services. Barriers to and recommendations for effective linkages are detailed.
Contact: Jossey-Bass at 215-433-1767

• National Alliance of Business. (1992). ***Basic skills for job performance: Private industry councils (PICs) and workplace literacy.*** Washington, DC: Author.
Good resource for providers working with PICs. Describes how PICs can become involved in workplace literacy programs and how to incorporate teaching basic skills in a job related context in programs for dislocated workers, upgraders, and workforce entrants.
Contact: National Alliance of Business at 202-289-2888

• Ohio State University, Cooperative Extension Service. (1992). ***Building coalitions.*** Columbus, OH: Author.
Excellent resource for trainers. Includes fact sheets on the following topics: Coalition Building, Coalition Goal Setting, Coalition Functioning, Structure, Coalition Facilitator Guide, Networking, Developing Members, Turf Issues, Understanding the Process, Evaluating the Process, Making a Difference, Mobilizing the Community, Working with Diverse Cultures, What is Communication?, Tapping Private Sector Resources, and Extra Resources.
Contact: Ohio State University, Cooperative Extension Service at 614-292-6181

• Quezada, S., & Nickse, R. S. (1993). ***Community collaborations for family literacy handbook.*** Boston, MA: Neal-Schuman Publishers, Inc.
Documents the experiences and insights of six MA community collaboration efforts. Although the context is family literacy programs, the handbook contains important information for any agency or individual collaborating with others, such as barriers to and elements of successful collaborations, and ideas for other communities to consider when planning collaborative efforts.
Contact: Neal-Schuman Publishers at 212-925-8650

• Waugh, S. (1992). ***An organizational approach to workplace basic skills: A guidebook for literacy practitioners.*** Ottawa, ON: Ottawa Young Men's and Young Women's Christian Association.
Concisely written guide for literacy practitioners working with business and industry. Includes chapters on mapping the community and marketing services, building partnerships, conducting an organizational needs assessment, developing a plan, and designing an evaluation strategy.
Contact: Ottawa YMCA at 613-788-5001

• Young, C. D. (1994). ***Asking new questions: Assessment for workplace literacy*** . Albany, NY: New York State Governor's Office of Employee Relations.
Report based on Project REACH, a labor-management partnership to meet the education needs of Civil Service Employees Association. Includes practical suggestions for education providers working with business (see pages 21-31).
Contact: New York State Governor's Office of Employee Relations at 518-473-3939

• Zeiss, T. (Ed.). (1991). ***Creating a literate society: College-business-community partnerships.*** Washington, DC: American Association of Community and Junior Colleges (AACJC).
Describes how these organizations are meeting the needs of adult learners. Sixteen case studies of effective literacy program partnerships are explained.
Contact: AACJC at 202-728-0200

Tips for Building Successful Partnerships

In the Beginning:

- Establish common goals and expectations for the program; create a shared vision of the processes and outcomes of the program.

- Choose a strong, committed leader. Identify communication contacts at each organization.

- Decide how resources will be pooled and shared.

- Involve all key players in all phases of program.

- Identify and spell out the strengths of each partner. Make sure all partners understand what the others bring to the partnership.

- As a group, decide on and define a decision making and conflict resolution structure.

- Find time to meet often.

Tips for Building Successful Partnerships

During the Project:

- Base partnerships on mutual respect and trust.

- Program decisions are mutually discussed and negotiated when necessary.

- All partners have equal power and representation in the project.

- Philosophical differences and barriers are openly discussed and resolved.

- Appropriate communication channels and processes are used for conflict resolution.

- Support for the project is demonstrated at all levels of each organization.

Barriers to Effective Partnerships

- Lack of clear vision and commitment in the project team.
- Competition exists among the partners.
- Partners have different goals for the partnership or program.
- Team has little time to meet.
- One partner has more power (resources, information, voice) than the others.
- Roles and responsibilities for project partners are not clearly defined and spelled out.
- Partners are close-minded or unwilling to participate collaboratively.
- Partners have different understandings and interpretations of commonly used terms and phrases (such as "literacy skills" or "team building").

Building Partnerships Worksheet #1: Speaking the Same Language

Part 1 Directions: Break into small groups and discuss the definitions of literacy used by the National Adult Literacy Survey and in the National Literacy Act of 1991. Discuss which definition you think would be most appropriate for a workplace literacy program and why. Discuss any changes you would make to the definition to make it more appropriate in a business setting.

National Adult Literacy Survey

A national panel of experts was assembled to construct a new definition of literacy for this national assessment. Their definition encompasses a broad range of skills that adults use for different types of literacy tasks in different contexts:

> *Using printed and written information to function in society, to achieve one's goals, and to develop one's knowledge and potential.*

National Literacy Act of 1991

Traditional definitions of literacy, which focused on decoding and signing one's name, were rejected by policymakers who defined literacy in the National Literacy Act of 1991 as follows:

> *An individual's ability to read, write, and speak in English and compute and solve problems at levels of proficiency necessary to function on the job and in society, to achieve one's goals, and to develop one's knowledge and potential.*

Building Partnerships Worksheet #1: Speaking the Same Language

Part 2 Directions: Break into small groups and brainstorm your own definitions for the following terms. Compare your answers with those in the glossary on pages G–1 to G–4 of this guide. As a whole group, discuss potential problems that could arise if team members have different conceptions of these terms and phrases; brainstorm ways to avoid misunderstandings stemming from different assumptions.

1. Assessment

2. Evaluation

3. High Performance Organization

4. Higher Order Skills

5. Problem Solving

6. Self-Directed Work Teams

7. Total Quality Management

8. Workplace Literacy

Building Partnerships Worksheet #2: Resources, Roles, Responsibilities

Directions: Brainstorm what resources, roles, and responsibilities each agency and its representative/s might contribute to a workplace literacy partnership.

Education Providers
Resources

Roles

Responsibilities

Union Representatives
Resources

Roles

Responsibilities

Company CEO
Resources

Roles

Responsibilities

Worker/s
Resources

Roles

Responsibilities

Front-line Supervisor
Resources

Roles

Responsibilities

PIC Representative
Resources

Roles

Responsibilities

Building Partnerships Worksheet #3: Resolving Team Conflict

Directions: Team building experts recommend that team leaders identify the source of the conflict among team members. For example, team members may disagree about *tasks* (roles, responsibilities, resources, decision making methods). Another cause of conflict is related to *identity* (interpersonal conflicts due to personalities, preferences, values, or beliefs). In each of the situations below, decide which key players are likely to be involved and whether the conflict is task-related or identity-related. Discuss possible solutions for each kind of conflict.

1. Disagreement over times that classes will meet

Key Players

Nature of Conflict

Possible Solution

2. Disagreement over where the classes will be held, on-site at the company or off-site at the union hall

Key Players

Nature of Conflict

Possible Solution

Building Partnerships Worksheet #3:
Resolving Team Conflict (continued)

3. The curriculum is not being implemented as it was intended; classes tend to get involved in discussions of labor relations issues on the job

Key Players

Nature of Conflict

Possible Solution

4. Some stakeholders don't attend meetings and won't discuss their reasons

Key Players

Nature of Conflict

Possible Solution

Working with Businesses and Unions

New trainees must be knowledgeable about the subtle yet specific differences between the organizational cultures of the business and labor communities. Often, management and labor each have their own agenda, terminology, and goals not only for the education program but also within the organization itself. The company's agenda may focus on retraining more flexible and multi-skilled workers to adapt to a participatory work environment; they may view education programs as a means for increasing productivity. Labor, however, may view education as a means for empowering their members to improve their job security, promotability, and wages. The union's concept of education may be broader than management's; they may consider workers' personal goals, rights on the job, and union information as important components of a workplace curriculum.

The workplace literacy provider often walks a fine line during program development and implementation, especially if tension exists between the company and the union. The overheads and worksheets in this section provide strategies to help trainees work with both parties. OH# 22 illustrates what businesses want from educators. It can be used with NWAC *Business Assistance Note #1* which provides the results of a series of 18 focus group interviews with employers, employees, and service providers from around the country. In addition, experienced providers report that businesses want to know how the program will benefit not only their workers but also the organization itself. OHs #23 and 23A provide an overview of a formula and some statistics for trainees to "prove a program works." OH #24 illustrates potential program benefits since financial returns are subject to much controversy and misinterpretation. OHs #25 and 26 provide tips for working with unions. OH #27 offers tips for determining when it would be in the provider's best interest to decline involvement in a program. Finally, the worksheets give trainees the opportunity to practice their responses to typical questions or comments from both businesses and unions.

Business and Unions

Materials in this Section

- OH #22: What Businesses Want From Educators
- OH #23 and 23A: Proving it Works
- OH #24: Potential Program Benefits
- OH #25-26: Tips for Working with Unions
- OH #27: When to Say No!
- Working with Business Worksheet #1 (page 69)
- Working with Business Worksheet #2 (page 70)
- Working with Unions Worksheet #1 (page 71)

Related Training Materials in the *Resource Notebook*

- *Workplace Literacy Interview Guide*
- *Union Point of View: Workplace Literacy*

Related Materials In Blue Folders

- *Workforce Briefs #1–4*
- *Business Assistance Note #1*
- *Workplace Literacy Product Checklist*
- *Workplace Literacy Interview Guide*
- *The New American Workplace* (AFL-CIO Committee Report, 1994)
- *Foundations for a Competitive Edge* (Illinois Resource Development Center Special, 1995)
- *Choosing the Right Training Program: A Guidebook for Small Businesses* (U. S. Department of Education, U. S. Department of Labor)
- National Center for Manufacturing Sciences (4 newsletters)

Training Ideas

Discussion Questions

- How will the needs of both the union and management be met?
- Do unions and the company have any common ground?
- How can you build on this common ground to promote the program and facilitate cooperation among team members?
- Why is it important to understand the union contract? the present/past labor/management history?
- How can you learn more about the organizational climate and structure of the company, the union, and their inter-relationship?

Activities

1. Show OH #22; have trainees brainstorm strategies under each topic that they think would meet the employer's expectations. Use NWAC *Business Assistance Note #1* to fill in the gaps. Discuss the business expectations as described in the pamphlet; are they realistic?
2. Use OH #23, 23A, and 24 to discuss the issue of convincing the employer that the program pays off. Be sure to stress that the program team should decide up-front if they will look at financial returns on investment. For more in-depth discussion and training on return on investment, see Carnevale, Gordon, and Mikulecky in suggested readings below. Also, see NWAC *Workforce Brief #4*.
3. Use OH #25 and 26 to discuss the union point of view. Invite a union representative to a training session to strengthen the impact of training.
4. OH #27 can be used as a springboard for discussion about why providers may choose not to get involved in a program.
5. The worksheets (pages 69-71) help trainees practice their responses to frequent questions and comments from businesses and unions. Use role plays and discussion with a representative from management and the union to provide additional practice.

Suggested In-Depth Readings

Working with Businesses

- Bergman, T. 91995). ***Basic workplace skills: The foundation for productivity improvements.*** (Workforce Brief #4). Washington, DC: National Workforce Assistance Collaborative (NWAC).

Includes current information about impact and extent of low basic skills, benefits of basic skills programs, and getting started addressing the problem.

Contact: NWAC at 202-289-2915

- Carnevale, A. P., Gainer, L. J., & Meltzer, A. S. (1990). ***Workplace basics training manual.*** San Francisco, CA: Jossey-Bass.

A step-by-step manual for establishing workplace basic skills training, including building support, identifying basic skills problems in the workplace, and evaluation. Includes a section on determining program development cost and time estimates.

Contact: Jossey-Bass at 215-433-1767

- Fisher, R., & Ury, W., & Patton, B. (199). ***Getting to yes: Negotiating agreement without giving in*** (2nd ed.). New York: Penguin Books.

Excellent resource for providers who wish to learn specific techniques for working with a variety of partners and in a variety of settings, especially in the business and industry community.

Contact: Penguin Books at 212-366-2000

• Gordon, E. E., Morgan, R. R., & Ponticell, J. A. (1994). ***Futurework: The revolution reshaping American business***. Westport, CT: Praeger.
Authors discuss applications of a cognitive training approach to improve thinking, problem solving, and comprehension in workplace training program; includes a chapter on "proving it works."
Contact: Praeger (now Greenwood) at 800-225-5800

• Mavrinac, S. C., Jones, N. R., & Meyer, M. W. (1995). ***The financial and non-financial returns to innovative workplace practices: A critical review*** (Executive Summary). Washington, DC: U. S. Department of Labor.
In most of the papers reviewed for this study, investments in workplace practices were associated with notable improvements in firms' financial performance. On average, the academic evidence does suggest that investments in TQM, JIT, incentives programs, and improvement in customer satisfaction and product quality levels can pay off in bottom-line profitability.
Contact: U. S. Department of Labor at 202-219-8660

• Mikulecky, L., & Lloyd, P. (1993). ***The impact of workplace literacy programs: A new model for evaluating the impact of workplace literacy programs.*** Philadelphia, PA: National Center on Adult Literacy, University of Pennsylvania.
Includes chapters with statistics, methods, and sample forms for assessing impact on both learners and productivity.
Contact: NCAL at 215-898-2100

• U. S. Department of Education and the National Alliance of Business. (1993). ***Transitions: Building partnerships between literacy volunteer and adult education programs: In-Depth papers from the national conference.*** Washington, DC: Author.
Although the conference addressed partnerships to ease transitions between programs, this resource contains practical ideas for building partnerships that would be beneficial for workplace literacy providers.
Contact: U.S. Department of Education at 202-205-8270

• Young, C. D. (1994). ***Asking new questions: Assessment for workplace literacy*** . Albany, NY: New York State Governor's Office of Employee Relations.
Report based on Project REACH, a labor-management partnership to meet the education needs of Civil Service Employees Association. Includes practical suggestions for education providers working with business (see pages 21-31).
Contact: New York State Governor's Office of Employee Relations at 518-473-3939

Working with Unions

• American Federation of Labor and Congress of Industrial Organizations (AFL–CIO), Committee on the Evolution of Work. (1994). ***The new American workplace: A labor perspective.*** Washington, DC: Author.
Describes the old system of work organization and the role unions have played in trying to change that system. Describes organized labor's vision of a model work system and the type of labor-management partnerships needed to create and sustain such systems.
Contact: AFL-CIO at 202-637-5000

• Chernow, H. (1993). ***Labor/management workplace education programs***. Malden, MA: Commonwealth of Massachusetts, Department of Education.

Presents an overview of the issues with an emphasis on often competing views of purposes and goals, recruitment, program design and assessment, and program oversight. Describes the experiences of the Service Employees International Union (SEIU) workplace literacy programs.

Contact: MA Department of Education at 617-388-3300

• Sarmiento, A. R., & Kay, A. (1990). ***Worker-centered learning: A union guide to workplace literacy.*** Washington, DC: AFL-CIO Human Resources Development Institute.

A concise and well-written guide to help union leaders better understand workplace literacy and develop and support worker-centered programs.

Contact: Human Resources Development Institute at 202-638-3912

What Businesses Want From Educators

- Customer focus
- Customization
- Expertise
- Affordability
- Commitment
- Guaranteed outcomes

Proving it Works !

"Return on Investment" Formula:

Improvements due to Training
- Training Costs
Training Benefits

What *improvements* does the company want?

- increased workers' skills
  - literacy
  - technology
  - communication
- fewer errors on the job
- increased productivity

How is *cost* determined?

- bottom line of contract with provider
- supplies and equipment
- facilities expenditures
- employee release time

Proving it Works !

Statistics

Reported Effects of 10 Workplace Literacy Programs in Chicago (Sticht, 1994)

Increased organizational effectiveness (by employer):	
increased productivity	48%
improved performance	71%
improved safety and communication	81%
workers more promotable	33%
company will continue program	33%
Employee reports that program helped them at:	
work	74%
getting more education	69%
home	55%
community	55%

Reported Effects in National Study of Workplace Programs in Small and Mid-Sized Companies
(Southport Institute for Policy Analysis, 1992)

Moderate to Substantial Improvements in:

- employee morale and self-confidence
- customer satistfaction
- workers' mathematics skills
- communication on the job
- workers' ability to solve problems
- ability to work as a team

Potential Program Benefits

- Prepares employees to deal with changes in the workplace
- Promotes continuous quality improvement activities
- Increases employee job satisfaction, morale, and self-esteem
- Increases productivity
- Enables more promotions from within the organization
- Improves the quality of products or services
- Improves employee safety in the workplace
- Increases communication and participation at meetings
- Promotes lifelong learning
- Increases employee job security and promotability
- Reduces absenteeism, turnover, and overtime

Tips for Working with Unions

- Involve the labor union from the very beginning.

- Use the term "workers" rather than "employees."

- Learn more about the role of the labor union in the workplace.

- Convince the union you will help their members.

- Recognize and work with the union's interests and objectives.

Tips for Working with Unions

- Don't sell a workplace literacy program to unions on the basis of increased productivity.

- Ensure equal access to all workers.

- Ensure confidentiality of individual worker's test scores.

- Unions can provide first-hand knowledge of workers, the workplace, industrial relations, and work processes.

- Look to unions to help you understand the rights of workers under the collective agreement.

When to Say No !

- Management and the union have an adversarial relationship.

- The company or other stakeholders will not commit adequate time or resources.

- The company wants to use test scores for firing and hiring.

- The management does not openly support the project.

- The company wants to make the program mandatory for certain workers.

Working with Business Worksheet #1

Directions: This worksheet will help you practice your response to a variety of statements an employer might make to a literacy provider. Write what resources you would use to find answers to the statements. Then draft your responses here and practice them orally with other trainees.

1. "We don't have a literacy problem here."
   Resources:

   Responses:

2. "Our workers don't need literacy skills on their job."
   Resources:

   Responses:

3. "We don't want more independent workers making decisions and solving problems; management takes care of that."
   Resources:

   Responses:

4. "What's in it for the company?"
   Resources:

   Responses:

Working with Business Worksheet #2

Directions: Draft your response to these questions an employer might ask a literacy provider. Check your responses against those suggested in the NWAC *Workplace Literacy Interview Guide*.

1. How will you ensure that the program will be relevant to my company's objectives and will reflect my company's and employee's needs?

2. How will you ensure that the instructional program will reflect my workplace and its literacy requirements?

3. How will you customize assessments to obtain specific information about the learner's ability to use literacy skills needed in the workplace?

4. How will you encourage the participation of workers?

5. How will you evaluate the program to ensure that it is effective and high quality?

Working with Unions Worksheet #1

Directions: This worksheet will help you practice your response to a variety of questions or statements a union representative might give a literacy provider. Write what resources you would use to find the answers. Then draft your responses here and practice them orally with other trainees.

1. "Team building and TQM just means more work and responsibilities for our members."
   Resources:

   Response:

2. "Educational opportunities may benefit our members, but they need higher wages and better benefits."
   Resources:

   Response:

3. "How will workers be selected for the program? What about seniority?"
   Resources:

   Response:

4. "What happens if a worker doesn't do well in the program or on a test? We don't want our workers to be discriminated against on the job because of their performance in the program."
   Resources:

   Response:

Section 4: The Literacy Work

Curriculum and Recruitment

The workplace literacy curriculum cannot be effectively delivered without a lot of up-front hard work and forethought by the project team, including planning and designing the instructional program so that it addresses the needs of all the stakeholders, assessing how the program will fit into the overall workplace culture and structure, developing the curriculum, and recruiting learners. All of these processes require a team initiative and the workplace literacy service provider is often responsible for overseeing this effort. This section provides materials to help trainees better understand the processes involved in developing these aspects of the program.

OH #28 provides tips for program planning and can be used to generate discussion on this topic. In addition, trainees should understand the basics of an organizational needs assessment (ONA), a process that helps the provider better understand the entire organizational structure and culture of the workplace. OH #29 illustrates the ONA process and will help trainees integrate the literacy program into the much larger culture and structure of the organization with which they are working.

Five or ten years ago, workplace literacy program providers had very few job-related curriculum materials to use in programs or to use as models to develop new materials. Since that time, numerous materials, resources, and curricula have been developed, many of which may be used or adapted by providers today. The thrust of this section is to help trainees identify existing materials and either adapt them or use them as is, as well as to help trainees develop customized curricula when necessary. OHs #30–32A illustrate the basic points of curriculum development. OH #30 can be used with the checklist on page 88 to demonstrate major decision points in the curriculum development process. OHs #31 and 31A provide an overview of the literacy task analysis, a process used by providers to develop customized curricula. OHs #32 and 32A give trainees practical tips and suggestions for developing curricula and instructional activities.

Recruiting learners is the final step before the delivery of the workplace literacy curriculum. Innovative and targeted recruitment techniques are the key to not only recruiting learners but also to developing enthusiasm and support for the program before it begins. OH #33 may be used with the chapter in the *Resource Notebook* entitled, *What Makes Workers Learn? The Role of Incentives in Workplace Education & Training* (Mikulecky, 1993). OH #34 provides practical tips. Together, these materials provide trainees with a solid theoretical and practical background to design a successful recruitment program.

Curriculum and Recruitment

Training Materials in this Section

- OH #28: Factors to Consider in Program Design
- OH #29: Overview of an Organizational Needs Assessment (ONA)
- OH #30: Curriculum and Instruction Decisions
- OH #31 and 31A: Overview of a Literacy Task Analysis (LTA)
- OH #32 and 32A: Curriculum Development Tips
- OH #33: Learner Incentives for Participation
- OH #34: Recruitment Tips
- WS: Curriculum and Instruction Checklist (page 88)
- WS: Sample Literacy Task Analysis Form (page 89)

Related Training Materials in the *Resource Notebook*

- *Curriculum Design for Workplace Literacy*
- *Developing Curriculum that Works - The Role of Workplace Educational Skills Analysis*
- *What Makes Workers Learn? The Role of Incentives in Workplace Education & Training*

Related Materials In Blue Folders

- NWAC Products
- VESL/Workplace Clearinghouse Catalog
- W. E. Upjohn Institute for Employment Research Catalog
- Business Publishers, Inc. Catalog
- Illinois Workforce Preparation Catalog
- ASTD Resource Card Deck
- Brochures from NNCCTVE

Training Ideas

Discussion Questions–Curriculum

- Why is an organizational needs assessment important for the current and especially for the future success and continuation of the program? Where and how would you get the information for the assessment?
- A literacy task analysis does not have to be extensive or time-consuming. What are some ways you can use a modified approach to identify the literacy requirements of the workplace?
- Where would you look for existing curricula?
- How can you facilitate transfer of learning back to the workplace?

Activities–Curriculum

1. Use OH #28 to discuss the various factors that affect the design and development of the instructional program. Have trainees brainstorm examples of each factor and how they might be considered during planning.
2. Use OH #29 to discuss the importance of an organizational needs assessment. Supplement with background readings from Waugh's booklet, *An Organizational Approach to Workplace Basic Skills*.
3. Use OH #30 with the *Curriculum and Instruction Checklist* (page 89). Discuss what factors trainees would consider for making each decision.
4. Use OHs #31 and 31A to discuss literacy task analyses. Have trainees choose some aspect of their job and use the LTA Worksheet (page 89) to practice performing an LTA.
5. Use OH #32 and 32A to provide trainees with practical suggestions for curriculum development.

Discussion Questions–Recruitment

- Who is your target audience? What do you know about them? How can this knowledge guide you in developing a successful recruitment campaign?
- Will you provide incentives for participation? How can you emphasize them when recruiting?
- How can the union assist with recruitment? the company? Who in the union or company would be the best contact for this task?

Activities–Recruitment

1. Use OH #33 and have trainees brainstorm examples under each heading. Then have trainees read the article, *What Makes Workers Learn? The Role of Incentives in Workplace Education & Training*, in the *WorkNet: Resource Notebook*. Have trainees go back and fill in specific ideas under each type of incentive and discuss how these ideas can be most effectively communicated to workers.
2. Use OH #34 and have trainees develop a recruitment piece (brochure, flyer, speech) that emphasizes one of the major incentives for participation.

Suggested In-Depth Readings

Resources for Assessing Needs

- Folinsbee, S., & Jurmo, P. (1994). ***Collaborative needs assessment: A handbook for workplace development planners.*** Don Mills, ON: ABC Canada.

This handbook includes information on how to ensure sensitivity to workforce diversity; customize the needs assessment to the committee's own workplace; conduct interviews and focus groups; analyze workplace documents and procedures for clear language and bias; analyze findings from the needs assessment; make recommendations for workplace education and organizational change; write a needs assessment report; pass on findings from the needs assessment; develop an action plan based on findings from the needs assessment.

Contact: ABC Canada at 416-442-2292

• Folinsbee, S., & Jurmo, P. (1994). ***Collaborative workplace development: An overview.*** Don Mills, ON: ABC Canada.

Presents ideas and steps to plan, start and maintain a collaborative workplace. Also introduces a series of handbooks that deal with the specific steps in workplace development. This handbook helps management decide if the collaborative method is the best approach to workplace development for their workplace.

Contact: ABC Canada at 416-442-2292

• Taylor, M. C., & Lewe, G. (1990). ***Literacy task analysis: A how-to manual for workplace trainers***. Nepean, ON: Algonquin College, Adult Basic Education Department.

Step by step guidelines for planning and conducting a literacy task analysis; includes ideas for various approaches, tools, and techniques to select the most useful. Also includes guidelines for using the results of an LTA to develop training.

Contact: Algonquin College at 613-727-4723

• Waugh, S. (1992). ***An organizational approach to workplace basic skills: A guidebook for literacy practitioners.*** Ottawa, ON: Ottawa Young Men's and Young Women's Christian Association.

Concisely written guide for literacy practitioners working with business and industry. Includes chapters on mapping the community and marketing services, building partnerships, conducting an organizational needs assessment, developing a plan, and designing an evaluation strategy.

Contact: Ottawa YMCA at 613-788-5001

Resources for Identifying Existing Curriculum

• Manly, D. (1994). ***Curriculum materials: A review for workplace education programs.*** Madison, WI: Center on Education and Work, University of Wisconsin.

Reviews workplace materials, provides contact and ordering information. Divided into Blueprint Reading, Communication, Computer Awareness, ESL, GED, Grammar, Math, Measurement, Occupation-Specific, Problem solving, Reading, Spelling, SPS, Typing, Writing, and Misc.

Contact: Center on Education and Work at 800-446-0399

• Powell, G. N. (1994). ***Gender and diversity in the workplace.*** Thousand Oaks, CA: Sage.

A book of exercises created to help workers gain an understanding of how gender and diversity issues may be dealt with sensitively and professionally. Appropriate for programs for managers, administrators, and workers. The exercises include individual, group and class activities, diagnostic instruments, role plays, case studies and simulations.

Contact: Sage Publishing at 805-499-0721

• Royce, S. (Ed.). (1994). ***1994 ABLE curriculum guide: A resource listing for ABLE practitioners***. Harrisburg, PA: Pennsylvania Department of Education.

Annotated bibliography of learners resources; all entries include title, publisher, author, description, setting for use, purpose, components, price, format, level, skills covered, and overall rating.

Contact: AdvancE at 800-992-2283 and WPALRC at 800-446-5607

• Royce, S. (Ed.). (1994). ***1994 ABLE curriculum guide: A resource listing for ESL practitioners.*** Harrisburg, PA: Pennsylvania Department of Education.
Annotated bibliography of learners resources; all entries include title, publisher, author, description, setting for use, purpose, components, price, format, level, skills covered, and overall rating.
Contact: AdvancE at 800-992-2283 and WPALRC at 800-446-5607

• Eric Documents with Sample Workplace Literacy Curricula
ED #353389, #355356, #326080, #329132, #311152, #359834

• National Workplace Literacy Program Abstracts
Contact: U. S. Dept.of Ed., Office of Vocational and Adult Education at 202-205-9872

Resources for Developing Customized Curriculum

• Askov, E. N., Aderman, B., & Hemmelstein, N. (1989). ***Upgrading basic skills for the workplace***. University Park, PA: Institute for the Study of Adult Literacy, The Pennsylvania State University.
Useful resource to help literacy providers and trainers develop and market a workplace literacy program. Includes sample instructional activities, needs assessment questionnaire, basic skills lists, readability formula, assessment and evaluation materials, and promotional materials.
Contact: ISAL at 814-863-3777

• Bergman, T., Fisher, C., & Frederick, F. (1993, December). ***Precision strike training in lean manufacturing: A workplace literacy guidebook***. Washington, DC: National Alliance of Business.
Designed to help individuals plan, develop, implement, and evaluate high quality workplace literacy programs. Appendices include excellent resources, such as sample evaluation and assessment surveys and procedures, interview guides, and training-level skills.
Contact: National Alliance of Business at 202-289-2888

• Carnevale, A. P., Gainer, L. J., & Meltzer, A. S. (1990). ***Workplace basics training manual.*** San Francisco, CA: Jossey-Bass.
A step-by-step manual for establishing workplace basic skills training, including building support, identifying basic skills problems in the workplace, and evaluation. Includes a sections on determining program development cost and time estimates.
Contact: Jossey-Bass at 215-433-1767

• Drew, R., & Mikulecky, L. (1988). ***How to gather and develop job-specific literacy materials for basic skills instruction***. Bloomington, IN: The Office of Education and Training Resources, School of Education, Indiana University.
Practitioner's guide to: 1) gathering job-related information and materials ; 2) analyzing them to determine job-related literacy requirements; and 3) developing instructional materials.
Contact: Indiana University at 812-855-3044

• Mikulecky, L, Henard, D., & Lloyd, P. (1992). ***A guidebook for developing workplace literacy programs.*** Indianapolis, IN: Office of Workforce Development, Indiana Government Center.
Guides service providers in developing workplace literacy programs. Provides practical advice

and guidelines for: 1) assessing training needs; 2) conducting literacy task analyses; 3) developing customized instruction; 4) delivering instruction to target groups; and 5) evaluating the program's effects.

Contact: Indiana Government Center at 317-233-3354

• Philippi, J. (1991). ***Literacy at work: The workbook for program developers.*** New York: Simon & Schuster and the National Alliance of Business.

An excellent, although expensive, resource for workplace literacy program developers and practitioners. Philippi gives the reader step-by-step guidelines for using work-related materials to develop curriculum, with special emphasis on the thinking and reasoning skills learners need.

Contact: Simon & Schuster at 212-245-6400

• Taylor, M. C., Lewe, G.R., & Draper, J. A. (Eds.). (1991). ***Basic skills for the workplace*** Toronto: Culture Concepts.

Provide guidelines for developing and implementing programs. Four major themes are developed: understanding the need for workplace literacy, identifying workplace training needs, examples of basic skills training, and approaches for program development.

Contact: Culture Concepts (now published by Krieger) at 407-724-9542

• Wrigley, H. S., & Guth, G. J. A. (1992). ***Bringing literacy to life: Issues and options in adult ESL literacy***. San Mateo, CA: Aguirre International

Effective and innovative instructional approaches for adult ESL students are discussed conceptually and in practice; includes many resources.

Contact: Aguirre International at 415-349-1842

Recruitment Resources

• Cookson, P. S. (Ed.). (1989). ***Recruiting and retaining adult students***. San Francisco, CA: Jossey-Bass.

Good resource for background reading on these issues as well as for practical ideas and suggestions for recruiting adult students.

Contact: Jossey-Bass at 215-433-1767

• Disario, N., & McMahon, J. (1991). ***Moving the worker into the classroom: A how-to handbook.*** Bethlehem, PA: Northampton Community College.

This handbook is a guide for companies and literacy programs to set up workplace instruction. It includes 11 brief guidelines for selecting an effective literacy teacher as well as recruitment ideas and suggestions.

Contact: AdvancE at 800-992-2283 and WPALRC at 800-446-5607

• Hirsch, D., & Wagner, D. A. (Eds.). (1993). ***What makes workers learn: The role of incentives in workplace education and training.*** Philadelphia, PA: National Center on Adult Literacy, University of Pennsylvania.

Twelve chapters explore the values of incentives for adult learning in the workplace. The book is organized in six sections: financial incentives; legal incentives; work organization incentives; incentives and learning methods; literacy and basic skills; and comparing industrialized and developing nations.

Contact: National Center on Adult Literacy at 215-898-2100

Factors to Consider in Program Design

- Stakeholders' goals and objectives
- Results of organizational needs assessment
- Results of literacy task analysis
- Workers' educational needs
- Availability of resources
- Predicted changes in the workplace
- Future lifelong learning opportunities

Curriculum and Instruction Decisions

- Curriculum Options

  Existing

  Customized

  Combination

- Delivery

  Method

  Medium

  Personnel

- Instructional Guidelines

  Relevance

  Transfer

  Multi-Strand

Overview of an Organizational Needs Assessment (ONA)

• An ONA provides a wholistic picture of the literacy needs of all workers in the organization

• An ONA involves an assessment of existing and future training and education opportunities, facilities, and equipment.

• An ONA yields an understanding of the overall workplace culture, its organizational structure, management styles, work processes, and problem-solving and communication channels

• An ONA entails an analysis of the potential barriers or constraints to integrating a workplace literacy program into the "learning culture" of the organization

OH #30

(Adapted from "*An Organizational Approach to Workplace Basic Skills*" by Waugh, 1992)

Overview of a Literacy Task Analysis (LTA)

• An LTA is a process of observing, collecting information and materials, and analyzing selected jobs or job clusters to identify their component literacy skills (reading, writing, speaking, listening, thinking, math, teamwork, and problem-solving).

• A comprehensive LTA to develop a complete, work-related curriculum may be lengthy and time consuming; a modified LTA to develop certain activities or to modify existing curricula may be more informal and less time-consuming.

• Prepare the company ahead of time for the LTA; obtain permission and clearance if necessary. Explain the process and schedule the interviews and observations.

• Remain non-threatening and cooperative! Try not to interrupt the work process; don't do anything to compromise safety.

Overview of a Literacy Task Analysis (LTA)

• Workers, supervisors and management should be involved during observation and data collection phases of LTA. Ensure confidentiality of participants' responses.

• Use the materials and information collected during the LTA, in combination with program goals and objectives, to develop a workplace literacy curriculum or to create specific instructional activities.

• After the LTA, analyze the materials and observations for component literacy skills; criticality; and tools, equipment or machinery required to complete the task.

• Results are then used to develop instructional activities and curriculum. Emphasize the critical and creative thinking skills (as well as the component literacy skills) needed to complete the task.

Curriculum Development Tips

• Schedule about five hours of development time for each hour of instruction.

• Write the goals and objectives of the curriculum and the instructional units first. Make the curriculum job-related rather than job-specific.

• Build on the work-related knowledge of the learners. Begin each lesson with a review of previous learning.

• Present new information in small steps.

• Use advance organizers that outline the main points and goals of the current lesson.

Curriculum Development Tips

• Help learners organize and store their knowledge in ways that facilitate memory. Use questioning and encourage learners to summarize new information in their own words.

• Stress critical and creative thinking and problem-solving skills.

• Build in lots of opportunities for realistic practice. Gradually withdraw guidance until learners can complete task independently.

• Provide multiple examples and opportunities for learners to see how skills and knowledge can be used in other situations.

• Provide support for workers to transfer their knowledge and skills. For example, hold discussions or reviews; an experienced coworker can provide peer support on the job.

Types of Learner Incentives for Participation

- Tuition or course support
- Continued educational growth
- Financial incentives, promotion, job retention
- Program flexibility
- Intangible benefits
- Removal of participation barriers

OH #33

(from "*What Makes Workers Learn: The Role of Incentives in Workplace Education and Training,*" edited by Hirsch & Wagner, 1993)

Recruitment Tips

- Use appropriate terminology and send positive messages

- Identify target population

- Identify the funder or sponsor, especially if it is the employer

- Choose recruitment medium

  posters

  flyers

  newsletters

  presentations

  technology

  announcements

  open houses

  personal contact

OH #34

(Adapted from "*Moving the Worker into the Classroom: A How-to Handbook*" by Disario & McMahon, 1991)

Curriculum and Instruction Checklist

Curriculum Options

- ❑ Existing
  - ❑ commercial
  - ❑ existing customized materials
  - ❑ 353 or National Workplace Literacy Program materials
- ❑ Customized
  - ❑ organizational needs assessment (ONA)
  - ❑ literacy task analysis (LTA)
- ❑ Combination
  - ❑ adapt or add to existing materials
  - ❑ modified LTA

Delivery

- ❑ Method
  - ❑ 1:1
  - ❑ programmed/independent
  - ❑ small groups
  - ❑ large group
  - ❑ combination
- ❑ Medium
  - ❑ print-based
  - ❑ technology-based
    - ❑ computer assisted instruction
    - ❑ distance learning
    - ❑ audio-video
  - ❑ combination
- ❑ Personnel
  - ❑ professional educators
  - ❑ trained tutors
  - ❑ peer tutors
  - ❑ combination

Instructional Guidelines

- ❑ Relevance
- ❑ Transfer
- ❑ Multi-Strand

Sample Literacy Task Analysis Form

Job Cluster: _____

Task: _____

Uses of Information

Literacy Requirements _____

_____

_____

Thinkings Skills _____

_____

_____

Interactions with People

Literacy Requirements _____

_____

_____

Thinkings Skills _____

_____

_____

Using Tools, Equipment, or Other Things

Literacy Requirements _____

_____

_____

Thinkings Skills _____

_____

_____

Learner Assessment

Workplace literacy programs need meaningful and reliable ways to measure what participants have learned in the program. Providers, with assistance from the project team, may choose from commercially developed assessments, create their own, or use a combination of both. The needs of all stakeholders must influence assessment decisions. For example, management may see assessment in light of how the workplace literacy program reflects improvements in the job performance of the workers. Funders may want information that can be compared across programs. The education provider may view learner assessment as a means of measuring both individual progress and program effectiveness. Workers may want assessment information that demonstrates personal growth. Unions are generally concerned with the needs of their members and may have objectives that serve the needs of the individual workers and the union overall. Each stakeholder's view of assessment influences what measures will be used in the program. For example, standardized tests may be used to meet the needs of government funders; performance-based techniques, like presentations or projects, may yield more meaningful information to workers. Providers and management may be most interested in how participants perform on customized curriculum-based assessments.

This section provides materials and resources to: 1) help trainees explore the kinds of assessments available to workplace literacy programs: 2) examine the legal, ethical, and practical concerns related to assessment; and 3) guide trainees to develop their own customized assessments for workplace programs. OHs #35 and 35A list some basic characteristics of various types of learner assessments. OHs #36 and 37 list the stakeholders and examples of commercial assessments. OHs #38 and 38A provide tips for creating locally developed assessments. OHs #39 and 39A illustrate basic legal issues related to testing. The handouts and worksheets on pages 104-107 provide more details on these topics.

Learner Assessment

Training Materials in this Section

- OH #35-35A: Types of Learner Assessment
- OH #36: Stakeholders in Workplace Literacy Programs
- OH #37: Commercially-Available Work-Related Assessments
- OH #38-38A: Tips for Creating Locally Developed Assessments
- OH #39-39A: Legal Issues
- Handout: Learner Assessments Measures: Strengths and Weaknesses (page 104)
- Worksheet: Stakeholders Assessment Needs (page 105)
- Handout: Commercially-Available Work-Related Assessments: Basic Information (pages 106-107)

Related Training Materials in the *Resource Notebook*

- The National External Degree Program
- *Approaches to Assessment in Workplace Literacy Programs: Meeting the Needs of all Clients*
- *Alternative Assessment: Use of Portfolio Assessment in a Workplace Literacy Program*
- *Alternative Assessment for Adult Learners*
- *Legal Issues in Workforce Education*
- *Mosaic* Newsletter: *Focus on Assessment*

<u>In Blue Folders:</u>

- Brochure from *WorkKeys*
- NWAC Products

Training Ideas

<u>Discussion Questions</u>

- Have you ever administered a norm-referenced test? What are some examples of norm-referenced tests? criterion referenced tests?
- How are curriculum-based and criterion-referenced tests similar? how are they different?
- Have you ever used performance-based or assessments? What were your successes and challenges? What are some examples?
- How often should assessment be conducted?
- Why is it important to consider the needs of all the stakeholders? How can you get this information? What are some other factors to consider when making learner assessment decisions?
- Have you ever developed a test? Describe your experience. What are the advantages and disadvantages of commercial tests over locally developed tests?
- How will you report test results? To whom? How will you involve learners?
- Who owns the assessment information?

Activities

1. Use the handout on page 104 with OHs #35-35A to discuss the types of learner assessments.
2. Have trainees complete the worksheet on page 105 as a group activity.
3. Discuss the handout on page 106-107. Have trainees compare and contrast the different tests. Have examples of each for trainees to examine if possible.
4. Have trainees brainstorm ways to increase and ensure confidentiality, validity, and reliability.
5. Use OHs #38 and 38A to discuss test development. Have trainees write sample test questions for different workplace situations requiring various basic skills. Critique and discuss each other's questions, especially for content validity.

Suggested In-Depth Readings

• Alderson, J. C. (Ed.) (1987). ***Reviews of English language proficiency tests***. Alexandria, VA: TESOL, Inc.

This guide contains descriptive and evaluative information on 47 major commercially-available English-as-Second-Language (ESL) tests in current use around the world. Each entry includes complete title, acronym, publication date, target audience, intended purpose, scoring method, administration type (group or individual), test length, test components, costs, author, publisher, contact, and a review.

Contact: TESOL, Inc. at 703-836-0774

• Arthur, D. (1994). ***An employer's guide to policies and practices. Workplace testing.*** New York: American Management Association.

Overview of a variety of work-related testing issues. Provides information about legal issues, public law, and ethical considerations of workplace testing. Good resource for background information about legislation and related issues.

Contact: American Management Association at 212-586-8100

• Askov, E. N. (1993). Approaches to assessment in workplace literacy programs: Meeting the needs of all the clients. ***Journal of Reading, 36*** (7), 550-554.

Describes how to select assessment tools for all the stakeholders (workers, unions, management, and service providers) in workplace literacy programs.

• Davis, A. E., & Arter, J. A. (1992). Annotated bibliography on ***ABE/ESL assessment.*** Portland, OR: Northwest Regional Educational Laboratory.

The first section is a review of large-scale assessment, alternative assessment, and published reviews of tests. Sections two, three, and four are updated annotated bibliographies on alternative assessments–portfolios, reading and math alternatives–which are available through the Test Center at the Northwest Regional Educational Laboratory.

Contact: Northwest Regional Educational Laboratory at 503-275-9500

• Institute for the Study of Adult Literacy. (1994). ***Mosaic: Research notes on literacy, 4*** (1), pp.1-11.

Includes articles on using a variety of assessments (Askov), current practice in assessment

(Alamprese), purpose and context of assessment (Lowe), computer-based assessment (Bixler), the APLS and NALS national assessments (Sticht), published vs. locally-developed assessments (Perin), and portfolio assessment (Fingeret).

Contact: ISAL at 814-863-3777

• Jackson, G. B. (1990). ***Measures for adult literacy programs.*** Washington, DC: Association for Community Based Education (ACBE) and the ERIC Clearinghouse on Tests, Measurement, and Evaluation.

Reviews 63 instruments that are designed to measure student outcomes. Includes information about each instrument's purpose, description, administration, alternate forms, reliability and validity, scoring and interpretation, availability, cost, and source. Useful for comparing and selecting instruments.

Contact: ACBE at 202-462-6333

• Lytle, S. L., & Wolfe, M. (1989). ***Adult literacy education: Program evaluation and learner assessment***. Columbus, OH: ERIC Clearinghouse on Adult, Career, and Vocational Education.

Summarizes current literature on program evaluation and learner assessment. Reviews contrasting perspectives and describes how underlying assumptions and beliefs inform providers' decisions about assessment and evaluation.

Contact: ERIC Clearinghouse on ACVE at 800-848-4815

• Reiff, T. (date). ***Assessments: Adult literacy independent learning packet***. Bethlehem, PA: Tri-Valley Literacy Resource Center.

Learning packet designed to help practitioners explore their own and new information about standardized and alternative assessments. Includes pre- and post-tests and resources.

Contact: AdvancE at 800-992-2283 and WPALRC at 800-446-5607

• Salvia, J., & Hughes, C. (1990). ***Curriculum-based assessment: Testing what is taught.*** New York: MacMillan.

Excellent resource for providers who develop their own assessment measures. Includes practical as well as technical considerations when developing tests in a variety of areas.

Contact: MacMillan at 800-843-8855

• Salvia, J., & Ysseldyke, J. E. (1995). ***Assessment: Sixth edition.*** Company. Boston, MA: Houghton Mifflin Company.

Overview text intended as a first course in assessment. Covers basic concepts, formal measures, reviews of assessments, legal and ethical considerations in assessment. Excellent resource for providers who develop their own assessments.

Contact: Houghton Mifflin at 615-725-5000

• System for Adult Basic Education Support (SABES), Massachusetts Department of Education. (1994). ***Adventures in assessment*** (Volumes 1–6: Loren McGrail, Editor). Boston, MA: Author.

This series includes articles written by practitioners on topics such as intake activities, tools for ongoing assessment, tools and procedures used at the end of a cycle, and reflections on the series.

Contact: SABES at 617-482-9485

• U. S. Department of Education, Office of Educational Research and Improvement, Educational Resources Information Center. (1994). ***Performance-based assessment***. (The ERIC Review, Vol.3, Issue 1). Washington, DC: Author.

This issue explores ways other than standardized tests to determine what students know and can do. Includes performance assessment techniques and resources.

Contact: ACCESS ERIC at 800-LET-ERIC

• Wiggins, G. (1993). Assessment: Authenticity, context, and validity. ***Phi Delta Kappan, 75*** (3), 200-213.

Looks at various testing formats, offers a detailed analysis of the factors needed to construct an authentic and valid test; includes nine factors regarding authenticity in testing. Important background reading for anyone developing tests for workplace literacy programs.

• Young, C. D. (1994). ***Asking new questions: Assessment for workplace literacy.*** Albany, NY: The Civil Service Employees Association, The New York State Governor's Office of Employee Relations.

This report discusses the project's findings on literacy use and assessment in the workplace context. Includes many practical suggestions for providers.

Contact: New York State Governor's Office of Employee Relations at 518-473-3939

Types of Learner Assessment

Norm-referenced

- compares individuals to norming group
- standardized
- commercially available
- yields quantitative data

Criterion-referenced

- compares individuals to absolute criterion or standard rather than to norming group
- assesses learning objectives
- commercially available or locally developed
- yields quantitative data

Curriculum-based

- measures whether what is being taught in a specific curriculum is being learned
- locally developed
- yields quantitative or qualitative data

Performance-based

- requires learners to *show* their skills or knowledge in some way
- emphasizes the process of solving problems rather than the "right answer"
- locally developed
- yields qualitative data

Attitudes

- measures feelings, values, or beliefs
- based on objectives related to attitudes
- commercial or locally developed
- yields qualitative data

Stakeholders in Workplace Literacy Programs

Learners

Union

Different Levels of Management
- Executive
- Middle Managers
- Front line Supervisors

Funders

Education provider

Commercially Available Work-Related Assessments

- A Day in the Life...
- Brigance Employability Skills Inventory
- Comprehensive Adult Student Assessment System (CASAS)
- Plato WorkSkills Package
- Test of Adult Basic Education: Work-Related Foundation Skills (TABE-WF)
- Test of Applied Literacy Skills (TALS)
- Wonderlic
- WorkKeys (Skills Assessment System)

Tips for Creating and Using Locally-Developed Assessments

1. Be clear about your purpose for testing. Be clear about the kinds of information you want to obtain.

2. Use your instructional objectives as a guide when designing test questions.

3. Assess progress on specific objectives and general goals.

4. Design questions that reflect what workers have been taught.

5. Choose assessment methods based on learners' preferences. For example, don't use a computer-based assessment if learners are uncomfortable using computers.

Tips for Creating and Using Locally-Developed Assessments

6. Administer the assessment the same way every time. For example, standardize the time allowed or the use of calculators.

7. Don't compare results across programs unless the programs and test administrations are similar in every way.

8. Put a disclaimer on the test. For example, Lancaster Lebanon Intermediate Unit #13 includes this disclaimer on their tests:

   This reading skills inventory was developed by Lancaster Lebanon Intermediate Unit 13's Adult Education Program under contract with _____. It has not been tested for reliability or validity; nor has it been normed against any group. It is intended only for use as a curricular placement instrument.

Legal Issues

Section 106 of Civil Rights Act of 1991

It shall be an unlawful employment practice for a respondent, in connection with the selection or referral of applicants or candidates for employment or promotion, to adjust the scores of, use different cut-off scores for, or otherwise alter the results of, employment-related tests on the basis of race, color, religion, sex, or national origin.

EEOC's Uniform Guidelines on Employee Selection Procedures

The use of any selection procedure which has an adverse impact on the hiring, promotion, or other employment or membership opportunities of members of any race, sex, or ethnic group will be considered to be discriminatory and inconsistent with these guidelines, unless the procedure has been validated in accordance with these guidelines.

Legal Issues

Confidentiality

In workplace literacy testing, confidentiality involves the disclosure of individual or group test scores to workers, employers, or the union. Confidentiality also entails storage of test records.

Reliability

A reliable assessment *consistently* produces the same results each time it is administered. Test items are clearly worded and not misunderstood by different test takers. Testing conditions are standardized.

Validity

A valid assessment measures what it says it measures (content validity). It indicates how *worthwhile* the test information will be in a given situation (predictive validity). For example, when workplace literacy test items are job-related and valid, high scores indicate ability to perform similarly on the job. A test may be valid for some populations or in some contexts but invalid in others.

Learner Assessment Measures: Strengths and Weaknesses Handout

Norm-referenced

- Strengths
  - reliable
  - can compare data across programs
- Weaknesses
  - content may be irrelevant
  - grade-level equivalents are irrelevant in the workplace
  - may measure test-taking skills rather than basic skills

Criterion-referenced

- Strengths
  - valid
  - if content is relevant to workplace, transfer is maximized
  - can compare data across programs
- Weaknesses
  - difficult to use in comparing individuals

Curriculum-based

- Strengths
  - relevant to curriculum
  - maximizes transfer
- Weaknesses
  - reliability may be compromised if test items produce inconsistent results

Performance-based

- Strengths
  - relevant and meaningful to workplace and learners
  - reveals growth in skills
- Weaknesses
  - can't compare across programs
  - if too learner-centered, measures may be irrelevant

Attitudes

- Strengths
  - attitudes are important component of performance
  - helpful for comparing attitude changes in groups
- Weaknesses
  - difficult to measure abstract concepts such as values, beliefs, or feelings
  - can't be measured directly
  - attitudes are variable and measure may produce inconsistent results

Stakeholders' Assessment Needs Worksheet

Directions: Brainstorm the kinds of assessment information, needs, and goals of the different stakeholders in workplace literacy programs. Use the strengths and weaknesses handout (page 104) and decide which type of assessment, if any, would best meet each stakeholders' needs.

Learners

Unions

Management

Upper level

Middle level

Front line supervisors

Funder

Education provider

Commercially-Available Work-Related Assessments:
Basic Information Handout

A Day in the Life...

Computer-based, criterion-referenced assessment of learners' basic skills in five job areas: health, food services, maintenance, retail, or clerical. Generates specialty reports include complete basic skills report, typed responses report, individual screen report, and a courseware map report.

Contact: Curriculum Associates at 800-225-0248

Brigance Employability Skills Inventory

Paper and pencil criterion-referenced test of learners' work-related basic skills and job awareness and job seeking skills. Correlates with SCANS Foundation Skills.

Contact: Curriculum Associates at 800-225-0248

Computer Curriculum Corporation (CCC)

Computer-based, work-related integrated learning system that provides instruction and automatic evaluation of employee's functional basic and higher order skills. Content is related to TALS proficiency levels.

Contact: Simon & Schuster, CCC at 800-227-8324

Comprehensive Adult Student Assessment System (CASAS)

Nationally validated system of more than 80 standardized assessment instruments to measure basic and higher order skills in everyday life and work contexts. Assessments have been validated with both native and non-native speakers of English; available in pencil and paper and computer-based formats.

Contact: CASAS at 800-255-1036

Plato WorkSkills Package (TRO Learning, Inc.)

Computer-based courseware that assesses learners' workplace basic and foundation skills; also available for advanced math, science, and technical skills. Prescribes individual learning path for each learner.

Contact: TRO Learning, Inc. at 800-869-2000

Test of Adult Basic Education: Work-Related Foundation Skill (TABE-WF)

Norm-referenced paper and pencil tests designed to measure basic skills in work-related contexts. The test has four forms (calibrated to TABE Tests 5-8): Health, Trade/Technical, Business/Office, and General.

Contact: CTB Macmillan/McGraw-Hill at 800-538-9547

Test of Applied Literacy Skills (TALS)

Standardized, paper test for assessing applied quantitative, prose, and document literacy; provides two forms for pre- and post-testing. Many of the test items came from the National Adult Literacy Survey. Scores indicate a level of proficiency, not a grade level.

Contact: Simon and Schuster at 800-395-7042

Wonderlic Basic Skills Test (WBST)

This assessment consists of two 20-minute timed paper and pencil tests of learner's job-related basic skills. Wonderlic Personnel Test, Inc. also provides a Validation Service to evaluate the relationship between the test scores of job applicants and their future job performance.

Contact: Wonderlic Personnel Test, Inc. at 800-963-7542

WorkKeys (Skills Assessment System)

Criterion-referenced, paper and pencil assessment of learners' skills in listening, writing, locating information, teamwork, applied mathematics, and applied technology. Meets the content validity guidelines of EEOC.

Contact: American College Testing Program, WorkKeys at 800-967-5539

Program Evaluation

Workplace literacy program evaluation involves a variety of players, numerous kinds of information collected from various sources, and the development of a concise report that summarizes and analyzes the information and makes recommendations for future efforts. All evaluation decisions should be directly related to the goals, objectives, and activities of the program. This section provides the resources to help trainees explore all of these aspects of program evaluation.

Providers or the project team must first decide who will be involved in program evaluation. They may choose an internal evaluator, an external evaluator, or a team that includes representatives from inside and outside the program. This decision depends on the availability of resources, the size and scope of the program, and the needs and goals of all the stakeholders. For example, a program in a small business with 10 or 12 participants will most likely use an internal or team evaluation approach. A large, ongoing program in a large business may choose an external or team evaluation approach.

Workplace literacy program evaluation involves the collection of information throughout the program (formative evaluation) and at the end of the program (summative evaluation). Various types of information should be collected about the participants, the program itself, and the impact of the program on the organization. Many workplace literacy program evaluators use Kirkpatrick's (1994) four-level model. The first level examines stakeholders' reactions to programs, usually gathered by questionnaire, evaluation survey, or interview. This level may also include the collection of basic program data such as enrollment statistics, hours spent in the program, retention and re-entry statistics, and demographic data that may be of interest to the stakeholders. Level two focuses on learners' mastery of basic skills via some form of learner assessment, such as standardized tests, locally developed tests, or performance-based assessments. At the third level, evaluators determine if and how well skills are transferred back to the job and/or the workers' lives outside of the job. Supervisor reports and worker self-reports provide this information. The fourth level explores how the workplace education program impacts the whole organization, such as increases in productivity, safety, attendance, or accuracy.

The final evaluation report or summary is a critical component of a workplace literacy program. Future decisions about the program may depend on the summary of program impact and the recommendations. The contents of and responsibilities for developing the report depend on the size and scope of the project, who conducts the evaluation, and the needs of the stakeholders. Several of the suggested in-depth reading resources on the next page provide final report samples.

Program Evaluation

Training Materials in this Section

- OH #40-40A: Levels of Program Evaluation: Tools and Sources for Data Collection
- OH #41A-D: Examples of Data Collected for Each Level
- OH #42: Contents of a Final Evaluation Report

Related Training Materials in the *Resource Notebook*

- *Workplace Educational Evaluation Design Checklist*
- *Team Evaluation: A Guide for Workplace Education Programs*
- *Education Brief: Using Portfolios in Program Evaluation*

Training Ideas

Discussion Questions

- When might you want to use an internal evaluator? external? team approach?
- What are some advantages and disadvantages of each?
- Should every program collect multiple levels of information? Why or why not?
- What are some conditions when an evaluator might not collect all levels of information?
- Why is an evaluation report essential? How can it affect future lifelong learning efforts?

Activities

1. Use OHs #40 and 40A to introduce the levels of program evaluation. Discuss why a good evaluation will collect different kinds of information. Have trainees work in small groups to brainstorms the kinds of information that might be collected at each level.
2. Use OHs #41A-D to illustrate the kinds of information that trainees may not have brainstormed in previous exercise. Have trainees work in small groups to develop a questionnaire, survey, and interview form to collect level one, three, and four data. Have samples (see suggested readings) for trainees to use as models.
3. Use OH #42 to show the elements of a final report. Discuss the kinds of information that might be included in each section. Have trainees brainstorm the kinds of recommendations that might be made in various scenarios.

Suggested In-Depth Readings

- Basarab, D. J., Sr., & Root, D. K. (1992). ***The training evaluation process: A practical approach to evaluating corporate training programs.*** Norwell, MA: Kluwer Academic.

Discusses formative and summative evaluation. Divides Kirkpatrick's four evaluation levels as Levels 1 and 2 being formative and Levels 3 and 4 as being summative. Explains the five phases

of the Training Evaluation Process. Could be used as a working manual for training evaluation. Charts, tables, instruments, sample evaluation plan, and sample final report could serve as models for designing evaluation.

Contact: Kluwer Academic at 617-871-6600

• Broad, M. L., & Newstrom, J. W. (1992). ***Transfer of training: Action-packed strategies to ensure high payoff from training investments***. New York: Addison-Wesley.

Offers "before, during, and after training" strategies for managers, trainers, and trainees to facilitate transfer of training back to the workplace. Excellent resource for providers.

Contact: Addison-Wesley at 800-447-2226

• Center for the Study of Evaluation. (1987). ***Program evaluation kit*** (2nd ed.) (Vols. 1-9). Newbury Park, CA: Sage.

This evaluation kit has 9 volumes (approximately 150 pages each):

Vol. 1. *The Evaluator's Handbook* by J. L. Herman, L. L Morris, & C. T. Fitz-Gibbon.
Vol. 2. *How to Focus an Evaluation* by B. M. Stecher & W. A. Davis.
Vol. 3. *How to Design a Program Evaluation* by C. T. Fitz-Gibbon & L. L Morris.
Vol. 4. *How to Use Qualitative Methods in Evaluation* by M. Q. Patton.
Vol. 5. *How to Assess Program Implementation* by J. A. King, L. L Morris, & C. T. Fitz-Gibbon.
Vol. 6. *How to Measure Attitudes* by M. E. Henerson, L. L Morris, & C. T. Fitz-Gibbon.
Vol. 7. *How to Measure Performance and Use Tests* by L. L Morris, & C. T. Fitz-Gibbon, & E. Lindheim.
Vol. 8. *How to Analyze Data* by C. T. Fitz-Gibbon & L. L Morris.
Vol. 9. *How to Communicate Evaluation Findings* by L. L Morris, C. T. Fitz-Gibbon, & M. E. Freeman.

Volume 1 has an overview and is a directory for the other manuals. It contains step-by-step procedural guides for conducting both formative and summative program evaluations, including setting the boundaries of the evaluation, selecting appropriate evaluation methods, collecting and analyzing information, reporting findings, and an example of an evaluation report. Each of the other volumes provides elaboration, explanation, and in-depth information for each aspect of the evaluation process.

Contact: Sage at 815-499-0721

• Human Resources Development Group. (1994). ***Establishing the value of training: Resource guide*** (HRDG Publication No. HRDG-023). Washington, DC: United States Office of Personnel Management, Office of Research and Information.

Provides a clear and concise tool to use when evaluating the value of training. Based on Kirkpatrick's four level evaluation model, a four stage evaluation process is utilized including: focus, plan, implement, and evaluate. Provides step-by-step procedures for doing training evaluation, but it is primarily focused on value. Tables and job aids (sample worksheets, checklists, etc.) are included. Covers the what, why, when, and how of evaluating the value of a training program.

Contact: Office of Personnel Management at 202-606-2424

Program Evaluation

Jurmo, P., & Folinsbee, S. (1994). ***Collaborative evaluation: A handbook for workplace development planners.*** Don Mills, ON: ABC Canada.

Handbook provides step-by-step directions for anyone planning and conducting a collaborative evaluation; includes ideas for getting commitments, setting up a committee, identifying different interests, how to monitor progress, and how to prepare reports. Written for novices and experienced evaluators.

Contact: ABC Canada at 416-442-2292

Kirkpatrick, D. L. (1994). ***Evaluating training programs: The four levels.*** San Francisco, CA: Berrett-Koehler.

Gives an in-depth look at Kirkpatrick's four levels of evaluation. Provides guidelines for each of the four levels of evaluation and elaborates each guideline. Discusses reasons for evaluation and how to implement the four levels. Contains case studies of implementing evaluation of training.

Contact: Berrett-Koehler at 415-288-0260

Manly, D. (1994). ***Workplace education evaluation checklist: A tool for assessing and improving performance.*** Madison, Wisconsin: University of Wisconsin, Center on Education and Work.

Four checklists can be used to evaluate workplace education programs: program design and administration indicators, participant achievement indicators, program outcome indicators, and evaluation tools. Checklists could be useful for the evaluation of other types of training and education programs if modified.

Contact: Center on Education and Work at 800-446-0399

• Mikulecky, L., & Lloyd, P. (1993). ***The impact of workplace literacy programs: A new model for evaluating the impact of workplace literacy programs.*** Philadelphia, PA: National Center on Adult Literacy, University of Pennsylvania.

Report on studies of two workplace literacy programs using the impact assessment model which focuses on changes in learners' literacy beliefs, practices, and goals; employer objectives such as improved safety, attendance, and productivity; and changes in learners' literacy activities with home and family.

Contact: National Center on Adult Literacy at 215-898-2100

Levels of Program Evaluation: Data Collection Tools and Sources

Level One
Reactions to Programs and Program Data

Tools

- surveys and questionnaires
- interviews

Sources

- participants and nonparticipants
- education providers
- program records

Level Two
Participants' Mastery of Skills

Tools

- learner assessments
- observation

Sources

- education providers
- participants

Levels of Program Evaluation: Data Collection Tools and Sources

Level Three
Participants' Application of Skills on the Job

Tools

- reports and self-reports
- interviews
- performance-based assessments

Sources

- participants and their coworkers
- supervisors
- education providers

Level Four
Program Impact on the Organization

Tools

- production statistics
- interviews or surveys

Sources

- supervisors and management
- self-directed work teams

Sample Information Collected

Level One Reactions to Programs and Program Data

How workers say the program affected their:

- ability to do their jobs
- job satisfaction
- family life or personal life
- chance for promotion
- ability to work in teams
- self-esteem
- ability to do other jobs in the company
- communication with coworkers

What the program records reveal about:

- number of enrollees
- number of completers of the program
- who participated

Sample Information Collected

Level Two
Participants' Mastery of Skills

Changes in learners' pre- and post-test scores on:

- norm-referenced tests
- criterion-referenced tests
- curriculum-based tests
- attitude assessments

Changes in learners' applied performance of skills or knowledge, such as changes in:

- writing skills reflected in portfolio
- communication skills in presentations

Sample Information Collected

Level Three
Participants' Application of Skills on the Job

Participants' self-reports of:

- how well they use new skills on the job
- how well they use new skills in their lives
- their ability to do other jobs in their department or in the company

Supervisors' or coworkers' reports of program participants':

- performance of targeted skills on the job
- overall performance
- ability to work well in teams

Sample Information Collected

Level Four Program Impact on the Organization

Management reports or records concerning:

Production statistics

- quality or error rates
- scrap, waste, or downtime
- customer satisfaction

Safety statistics

- accidents

Employee data

- attendance
- turnover
- promotions

Future lifelong efforts in the company

Suggested Elements of an Evaluation Report

Brief Project Overview
- need
- project staff
- program development

Program Evaluation Methodologies
- personnel
- data collection procedures
- rationale

Summaries and Analyses of Data
- levels one through four

Conclusions and Recommendations
- impacts on company, workers and their families, the community
- strengths and challenges of the program
- suggested changes for future efforts
- integration of program into company's other training and education efforts

Section 5: Glossary

Glossary

Assessment - collecting and analyzing information to make judgments about the learning progress of individuals or groups; range from formal and standardized (such as TABE) to criterion referenced (CRTs) to alternative (portfolios) to informal (observation).

Business Size – Small - fewer than 100 employees
Medium - 100-500 employees
Large - over 500 employees

Collaborative Learning - education environment that stresses interaction among learners and with instructors, mutual support and respect rather than competition, and the construction rather than transmission of knowledge; learners often work together in pairs or small groups on a common problem.

Computer Numerically Controlled (CNC) Machine - method of controlling a machining tool by entering coded instruction (number, letters, symbols); the instructions are processed by the machine control unit (computer) and converted into electrical pulses of current which control the machine to make a precision part.

Contextualized Instruction - developing skills, knowledge, and attitudes in the context in which they will be used, using real-life materials and situations from that context.

Cost-Benefit Analysis - process to compare the costs of establishing an intervention (such as a workplace literacy program) with the benefits (such as increased productivity, less waste or fewer errors, lower absenteeism, better communication).

Critical Incident - important event, action, or behavior in the workplace that is systematically analyzed and discussed to improve behavior or performance.

Customized Instruction - specially designed curriculum and instruction tailored to meet the specific needs, goals, and interests of a certain group (such as a workplace).

e-mail - sending and receiving messages via computer; individuals or organizations have e-mail addresses (such as psc3@psu.edu).

Glossary

Empowerment Zone (EZ) / Enterprise Community (EC) - federal initiative to do "everything possible" to revitalize areas that meet certain poverty criteria, such as low income, lack of employment opportunities, and urban decay; links economic development with education and training along with community development, public safety, human services, and environmental programs; provides federal grant funds and substantial tax benefits; current EZ funding supports 6 urban and 3 rural communities across the United States; EC funding supports 65 urban and 30 rural communities.

Ethnographic Study - intensive observation of human behavior in its natural setting over a substantial period of time, usually of carefully selected particular cases; incorporates as many of the complexities and variables in the setting as possible.

Evaluation - process of collecting and analyzing data on various aspects of a program, usually for the purpose of program planning and goal setting, securing funding, improving processes and outcomes, and allocating resources. Includes *formative* (collecting and analyzing data to focus on "what's working and what needs to be improved") and *summative* (collecting and analyzing to investigate "what's been achieved" in a program).

External Diploma Program (EDP) - high school credentialing process designed especially for adults; program assesses skills in real-life context, gives recognition for learning already acquired (including competence in their current job), allows adults to direct their own learning, and awards a traditional diploma in conjunction with local school districts and state agencies.

Gopher – menu-based site on the Internet that allows you to link to other sites on the Internet as well as explore and access information resources, such as databases, articles, curriculum materials, and current events.

High Performance Organization (HPO) - workplace in which all employees solve problems, improve the work process, and monitor the quality of the product or service through increased communication, feedback, and teamwork.

Higher Order Skills - thinking skills that people use to put basic skills and other knowledge together to solve problems, make decisions, and better understand information, situations, and people. They include critical and creative thinking as well as metacognitions (being aware of and managing one's thoughts and thought processes).

Individualized Education Plan (IEP) - written education plan for individual learners including action plan, goals and objectives, and timetable; usually developed jointly by any or all of following: educators, counselors , learners, tutors, and mentors.

Internet - an interconnected group of over 10, 500 computer networks in at least 40 countries. It allows users to share information and resources and communicate electronically, such as by sending e-mail, participating in electronic discussion groups, transferring computer files, and browsing through thousands of collections of information. The Internet has traditionally been text based, but is rapidly expanding into a multi-media source of information.

International Standardization Organization (ISO) 9000 - international standards for quality assurance management systems; establishes an organizational structure for ensuring consistent and agreed upon level of quality of production of goods and services; many countries and companies will not do business with companies that do not meet these standards.

Listserv – electronic forum in which users can post and receive messages; all subscribers receive the messages posted to the listserv (sometimes called "list").

Literacy Task Analysis - systematic approach to observing and identifying how communication, math, thinking and personal skills are used to complete a task.

Mentoring - serving as a model for others who are inexperienced; includes both the physical modeling of a task or behavior as well as the mental (thinking) steps required to effectively perform the task or behavior.

Organizational Approach - in a workplace literacy program, examines basic skills within the context of the workplace culture and workplace issues; recognizes that learning and using skills is integrated into all aspects of an organization.

Participatory Approach - all members of a group have the opportunity to contribute through inquiry and reflection to the activities of the group; a democratic process in which the power is shared equally, with individuals having substantial amounts of control and responsibility.

Partnerships - collaborative partnerships establish common goals and agree to pool resources, jointly plan, implement and evaluate partnership activities. Cooperative partnerships involve partners who help each other to meet respective organization goals, without making substantial changes in the services each provide.

Glossary

Qualitative Data - data that are characterized by narrative description and interpretation; collection and interpretation of data is not constrained by predetermined categories or responses.

Quantitative Data - data that is compiled and analyzed numerically; collected via standardization to limit number of possible responses.

School-to-Work (STW) -- administered jointly by Department of Labor and Department of Education, the STW Act is designed to encourage partnerships of employers, educators, and others (such as community groups and labor unions) to build quality systems for helping students make the transition from school to a good first job in a high-skill, high-wage career. Combines learning at the work site with learning in school to prepare students for jobs requiring technical skills or further education and training.

Skills Standards – performance specifications that identify the knowledge, skills, and abilities an individual needs to succeed in a workplace; they define a common language of quality and expectations for employers, workers, job seekers, educators, and human resource managers.

Statistical Process Control (SPC) - system of charting and analyzing statistical information about the production and service delivery process at several points along the process.

Total Quality Management (TQM) - communication, feedback, and teamwork of all employees to control quality; often involves statistical process control (SPC) or computerized numerical control (CNC).

Value-Added Outcome - idea or suggestion that has led to significant savings or improvements in processes or outcomes.

Worker-Centered Education - curriculum and instruction that focuses on workers' experiences and construction of knowledge rather than those of the instructors or employers.

Workforce Education/Literacy - umbrella term for educational opportunities for existing, new, or dislocated workers; includes career exploration, job search and employability skills, as well as English as a Second Language (ESL), basic, higher, and interpersonal skills.

Workplace Education/Literacy - umbrella term for educational opportunities for workers that are supported in some way by an employer (such as through cash or in-kind contributions, facilities or equipment provision, mentoring); may include instruction in ESL, reading, writing, speaking, listening, math, and personal and interpersonal skills.

Section 6: Resources

Newsletters

A.L.L. Points Bulletin (bi-monthly; free)
U. S. Department of Education
Division of Adult Education and Literacy
U.S. Department of Education
Washington, DC 20202-7240
202-205-8973

CASAS Quarterly Report (quarterly; free)
8910 Clairemont Mesa Boulevard
San Diego, CA 92123
800-255-1036

CEI Workplace Education Report
Continuing Education Institute, Inc.
35 Highland Circle
Needham, MA 02194
617-449-4802

Connections (free)
National Center on Adult Literacy
University of Pennsylvania
3910 Chestnut Street
Philadelphia, PA 19104-3111
215-898-2100 (FAX: 215-898-9804)
e-mail: mailbox@literacy.upenn.edu

Hands-on English (6/yr; $10-16)
A periodical for teachers and tutors of adult ESL
P.O. Box 256
Crete, NE 68333
800-ESL-HAND

Focus (monthly, free)
National Center for Manufacturing Sciences
3025 Boardwalk
Ann Arbor, MI 48108
313-995-0300

Mosaic (3/yr; free)
Institute for the Study of Adult Literacy
204 Calder Way, Suite 209
University Park, PA 16801
814-863-3777 (FAX: 814-863-6108)

Resources

National Center for the W orkplace Newsletter (quarterly)
Institute of Industrial Relations
University of California at Berkeley
2521 Channing Way
Berkeley, CA 94720
510-642-8545 (FAX 510-642-6432)
e-mail: NCW@uclink.berkeley.edu

National Institute for Literacy Newsletter (free)
800 Connecticut Avenue, NW
Suite 200
Washington, DC 20202-7560

National Workforce Assistance Collaborative: Workforce Briefs and Notes
National Alliance of Business
1201 New York Avenue, NW
Suite 700
Washington, DC 20005
202-289-2915

National Clearinghouse on Literacy Education (NCLE) Notes (2/yr.; free)
1118 22nd Street, NW
Washington, DC 20037
202-429-9292, ext. 200

NCRVE Change Agent (3/yr.; $35)
NCRVE Materials Distribution Service
Western Illinois University
46 Horrabin Hall
Macomb, IL 61455
800-637-7652

OERI Bulletin (quarterly; free)
OERI Bulletin
555 New Jersey Avenue NW
Washington, DC 20208-5570
800-424-1616
e-mail: OERIbulletin@inet.ed.gov

Online with Adult and Continuing Educators (bimonthly; $13; $7 AAACE members)
American Association for Adult and Continuing Education
2101 Wilson Boulevard, Suite 925
Arlington, VA 222-1
703-522-2234 (FAX: 703-522-2250)

Report on Literacy Programs (bi-weekly; $260)
951 Pershing Drive
Silver Spring, MD 20910-4464
800-274-0122 (FAX 301-585-9075)

Resource Development News
Illinois Literacy Resource Development Center
209 West Clark
Champaign, Il 61820
217-355-6068

Rural Adult Education Forum (6/yr.; $15)
Rural Clearinghouse for Lifelong Education and Development
College of Education
Kansas State University
111 college Court Building
Manhattan, KS 66506-6001
913-532-4392

What's the Buzz
Box 214
Troy, PA 16947

Work America (monthly; $30 year)
National Alliance of Business
1201 New York Avenue
NW, Suite 700
Washington, DC 20005
202-289-2888

Workplace Network News (quarterly; free)
Office of Vocational and Adult Education
U. S. Department of Education
Washington, DC 20202-7240
202-205-8973

Workforce Skills (quarterly; free)
Skills for a Competitive Workforce Program
The Colorado College and Occupational Education System
1391 North Speer Boulevard
Denver, CO
303-620-4029 (FAX: 303-825-4295)

Resource Organizations

National

AFL-CIO
Human Resources Institute
815 16th Street, NW
Washington, DC 20006
202-637-5144

American Society for Training & Development (ASTD)
1640 King Street, Box 1443
Alexandria, VA 22313
800-628-2783
e-mail: astdic@capcon.net

Center for Quality Management
150 Cambridge Park Drive
Cambridge, MA 02140
617-873-2152 FAX: 617-873-2155

Council for Adult and Experiential Education (CAEL)
1243 South Wabash Avenue, Suite 800
Chicago, IL 60604
312-922-5909 FAX: 312-922-1769
e-mail: cael@interaccess.com

ERIC Clearinghouse on Adult, Career, and Vocational Education
1900 Kenny Road
Columbus, OH 43210-1090
800-848-4815
e-mail: ericacve@magnus.acs.ohio-state.edu

Educational Quality of the Workforce
University of Pennsylvania
4200 Pine Street, 5A
Philadelphia, PA 19104-4090
800-437-9799
e-mail: eqw-requests@irhe.upenn.edu

Illinois Literacy Resource Development Center (ILRDC)
209 West Clark Street
Champaign, IL 61820
217-355-6068 FAX: 217-355-6347
e-mail: ilrdc@prairienet.org

Institute for the Study of Adult Literacy
Pennsylvania State University
204 Calder Way, Suite 209
University Park, PA 16801
814-863-3777 FAX: 814-863-6108

National Alliance of Business
1201 New York Avenue, NW
Suite 700
Washington, DC 20005
202-289-2915

National Center for Manufacturing Sciences
3025 Boardwalk
Ann Arbor, MI 48108
313-995-0300 FAX: 313-995-1150

National Center for Research in Vocational Education (NCRVE)
Materials Distribution Service
Western Illinois University
46 Horrabin Hall
Macomb, IL 61455
800-637-7652
e-mail: msmds@uxa.ecn.bgu.edu

National Center on Adult Literacy (NCAL)
University of Pennsylvania
3910 Chestnut Street
Philadelphia, PA 19104-3111
215-898-2100 FAX 215-898-9804
e-mail: ncal@literacy.upenn.edu

National Labor-Management Association
P.O. Box 819
Jamestown, NY 14702-0819
716-665-3654 FAX: 716-665-8060

National Network for Curriculum Coordination in Vocational & Technical Education
Martha Huleatte, Director
Crest Way
Aberdeen, NJ 07747
908-290-1900 FAX: 908-290-9678

Resources

Office of the American Workplace
U. S. Department of Labor
200 Constitution Avenue, NW, Room N-5042
Washington, DC 20210
202-219-6098 FAX: 202-219-8762

Training Technology Resource Center
U. S. Department of Labor
200 Constitution Avenue, NW
Room N-6511
Washington, DC 20210
202-219-5600; 800-488-0901
FAX: 202-219-4858

W. E. Upjohn Institute for Employment Research
300 South Westnedge Avenue
Kalamazoo, MI 49007-4686
616-343-4330 FAX 616-343-7310

Work in America Institute
700 White Plains Road
Scarsdale, NY 10583
914-472-9600 FAX: 914-472-9606

Pennsylvania

***AdvancE* (State Literacy Resource Center)**
333 Market Street, 11th Floor
Harrisburg, PA 17126-0333
800-992-2283 FAX: 717-783-5420

Bureau of Small Business and Appalachian Development
Office of Small Business
461 Forum Building
Harrisburg, PA 17120
717-783-5700

Center for Business and Community Services
Delaware County Community College
Route 252 and Media Line Road
Media, PA 19063
215-359-5367

Center for Business and Industry
Northampton Community College
3835 Green Pond Road
Bethlehem, PA 18017
610-861-5071

Council for Adult and Experiential Learning
Phyllis Snyder, Regional Director
12265 Townsend Road, Suite 500
Philadelphia, PA 19154-1286
215-969-5663 FAX: 215-969-6652

Customized Job Training (CJT) Program
Bureau of Vocational-Technical Education
333 Market Street
Harrisburg, PA 17126
717-783-8506

Pennsylvania Chamber of Business and Industry
One Commerce Square
417 Walnut Street
Harrisburg, PA 17101
800-225-7224 or 717-255-3252

Pennsylvania State Data Center
Institute of State and Regional Affairs
Pennsylvania State University at Harrisburg
Middletown, PA 17057
717-948-6336

Pennsylvania State University Cooperative Extension Program
The Family Living Extension Section
323 Agricultural Adminstration Building
University Park, PA 16802
814-863-7869

Pennsylvania Technical Assistance Program (PENNTAP)
110 Barbara Building II
810 North University Drive
University Park, PA 16802
814-865-0427

Western PA Adult Literacy Resource Center
5347 William Flynn Highway, Route 8
Gibsonia, PA 15044-9644
800-446-5607 FAX: 412-443-1310

Electronic Resources

This section describes two kinds of electronic resources: listservs and gophers. *Listservs* (also called mailing lists, lists, or discussion forums) are electronic forums where subscribers share information and resources. After you subscribe to a listserv, you will receive all messages that are posted (sent) to the list. *Gophers* are sites on the Internet where you can access resources, such as databases, articles, curriculum materials, and recent information.

Listservs

Listservs have at least two addresses. One, the subscription address, is for the computer and usually begins with "listserv@..." The other address is to send messages to the list; that is the address to which you will post messages once you are subscribed.

To subscribe to any of the listservs, send an e-mail message to the subscription address. After you have entered the address, leave the subject line blank, and type the following in the message line: "subscribe LIST NAME Yourfirstname Yourlastname". For example:

Date:	Thu, 2 Mar 1995 10:30
From:	jdoe2@psu.edu (Jane Doe)
To:	listserv@alpha.acast.nova.edu
Subject:	
	subscribe AEDNET Jane Doe

ADA-LAW
Subscription Address: **listserv@ndsuvmi.bitnet**
Description: This list provides a forum for discussing any aspects of the Americans with Disabilities Act (ADA) and other disability related laws.

AEDNET
Subscription Address: **listserv@alpha.acast.nova.edu**
Description: The Adult Education Network is a moderated discussion group centered around issues related to adult education .

ALTLEARN
Subscription Address: **listserv@sjuvm.bitnet**
Description: Alternative Approaches to Learning is a moderated discussion group centered around alternative learning and teaching practices.

DEOS-L
Subscription Address: **listserv@psuvm.psu.edu**
Description: The American Center for the Study of Distance Education at Pennsylvania State University sponsors this list, which is an international discussion forum for distance education. The list's purpose is to promote communication among distance educators, and to disseminate information and requests about distance education around the world.

EDNET
Subscription Address: **listserv@nic.umass.edu**
Description: A moderated discussion group for those interested in exploring the educational potential of the Internet. Discussions range from K-12 through postsecondary education. A very active list.

EDSTYLE
Subscription Address: **listserv@sjuvm.bitnet**
Description: A moderated discussion group which focuses on all forms of adult learning styles.

LEARNER
Subscription Address: **listserv@nysernet.org**
Description: A moderated literacy discussion group for adult learners to practice their newly learned reading and writing skills by posting messages to the list which can be read by other new learners. LEARNER also helps students learn how to use e-mail and Internet listservs.

LITERACY
Subscription Address: **listserv@nysernet.org**
Description: This is a moderated general discussion group for those concerned with the issues surrounding literacy. It is hoped that the group will foster discussion by those involved in teaching adults to read and write.

NIFL-WORKPLACE
Subscription Address: **listproc@novel.nifl.gov**
Description: This list will feature targeted discussion about workplace literacy issues such as marketing, instruction, curricula, assessment, evaluation, staff training, research, and policy.

NLA
Subscription Address: **majordomo@world.std.com**
Description: A National Literacy Advocacy List (NLA) designed to provide information and discussion about literacy education and adult learners.

NUMERACY
Subscription Address: **majordomo@world.std.com**
Description: Discussion of issues in adult numberacy instruction and research.

NWAC-L
Subscription Address: **listserv@psuvm.psu.edu**
Description: NWAC-L is an electronic forum for discussing workplace literacy issues, sharing information (instructional strategies and materials, research and its applications, staff training approaches, etc.) and reviewing/critiquing materials produced by the National Workforce Assistance Collaborative (NWAC).

PERKACT
Subscription Address: **listserv@siucvmb.siu.edu**
Description: The purpose of PERKACT is to provide a forum for people working with the Carl D. Perkins Vocational and Applied Technology Act. The group hopes that practitioners can benefit

from the experience of Special Population Coordinators and others nationwide who deal with Perkins everyday. The list is meant to be a meeting ground for interested parties to help each other use the Perkins programs to the best benefit of students and communities.

SKILLSNET
Subscription Address: **listproc@atsi.edu**
research findings, practical applications of research, program guides, staff training approaches, evaluation methods, reviews and critiques of materials produced by NWAC, as well as other related information.

Gophers

Small Business Administration (SBA)
Address: **www.sbaonline.sba.gov (port 70)**
Description: In the SBA gopher, you will find many files detailing the SBA Programs and the many services SBA has to offer the public and the Small Business Community. There are many lists of valuable sources of information including address/phone lists of all SBA offices, Business Information Centers, SBA Disaster Area Offices, Service Corps of Retired Executives (SCORE), Small Business Development Centers, Small Business Investment Companies, and Veterans Affairs Officers. You will find many training aids, such as how to create a business plan and instructions on how to obtain all of SBA's publications.

National Center on Adult Literacy (NCAL)
Address: **litserver.literacy.upenn.edu (port 70)**
Description: The NCAL gopher offers archives of NCAL materials, such as research publications, the Connections newsletters, and support materials developed for the NCAL/PBS staff development videoconference series; searchable databases on commercial adult literacy software and software publishers, archive of free adult literacy software and shareware; related listservs , gophers, and USENET groups; archive of federal legislation that has structured the adult literacy system in the U.S; calendar of events; and information on State Adult Literacy Resource Centers (SLRCs).

Legi-Slate
Address: **gopher.legislate.com (port 70)**
Description: The Legi-Slate gopher service is the first combined federal legislative and regulatory service available over the Internet. It provides information about all bills and resolutions introduced in Congress since 1993. You can locate bills and resolutions by specific number, "Hot Bills" category, Legi-Slate subject term, sponsor, chamber, and type of legislation, words in the official title, and words in full text. Updated daily, the server provides up to 17 different documents for each bill and resolution. It also provides full text of all documents published in the Federal Register since January 3, 1993.

U. S. Department of Education
Address: **gopher.ed.gov (port 70)**
Description: This gopher sites includes numerous resources from the DoE, including from the offices of Educational Research and Improvement (OERI) and Vocational and Adult Education (OVAE). For example, the OVAE folder includes fact sheets, state contacts, common questions and answers, promising programs, legislation, and speeches and related briefings.

Outreach and Technical Assistance Network (OTAN)
Address: **gopher. scoe.otan.dni.us (port 70)**
Description: The OTAN network is designed to provide technical assistance, staff training and information to adult education providers in California and interested adult education agencies from other states. The forum provides statewide calendar and directory information, current and historical adult education resources, sample course outlines and lesson plans, educational grant information, legislative tracking, public domain and demo software, and other curricula resources.

AskERIC
Address: **ericir.syr.edu (port 70)**
Description: Ask ERIC gopher has an extensive body of education-related resources for teachers, library media specialists, administrators, and anyone else involved in education. Some of the resources in the Virtual Library include lesson plans, ERIC Digests and Publications, reference tools, Internet guides and directories, and government information.

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Resources

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Curriculum Resources

Curriculum Resource Guides

- **Guide to Workplace Literacy Resources in AdvancE and WPALRC**
  Contact: AdvancE 800-992-2283 or WPALRC 800-446-5607

- **Curriculum Materials: A Review for Workplace Education Programs**
  Contact: Donna Manly (Ed.) 800-446-0399
  Center on Education and Work, University of Wisconsin-Madison

- **1994 ABLE Curriculum Guide: A Resource Listing for ABLE Practitioners**
  Contact: AdvancE 800-992-2283 or WPALRC 800-446-5607

- **1994 ABLE Curriculum Guide: A Resource Listing for ESL Practitioners**
  Contact: AdvancE 800-992-2283 or WPALRC 800-446-5607

- **Vocational English as a Second Language (VESL) Workplace Clearinghouse 1994 Catalog**
  (lists public domain materials developed by adult education agencies throughout the country)
  Contact: San Diego Community College, Continuing Education Center
  619-265-3458

- **National Network for Curriculum Coordination in Vocational and Technical Education (NNCCVTE)**
  Contact: Martha Huleatte, Director 908-290-9678

- **Wisconsin Workplace Education: Materials Used in Workplace Education Sites and Recommended by Workplace Instructors**
  Contact: Tom Grinde, Education Specialist Wisconsin Literacy Resource Network
  608-266-0790

National Workplace Literacy Curricula

- **Direct Care Workers in Long Term Health Care Facilities**
  Contact: Regina Guaraldi, Project Director 305-237-2878
  Miami-Dade Community College, FL

- **Industrial Construction Workers, Millwrights, Pipefitters, Petrochemical Workers ("ABCs of Construction" Project)**
  Contact: Pam Wall, Project Director 504-752-0088

- **Limited English Proficient Garment Industry Workers ("The Cutting Edge")**
  Contact: Kay Taggart Curriculum Coordinator 504-542-2745
  El Paso Community College, TX

Resources

- **Manufacturing Industry Workers**
  Contact: Virginia Farrell, Project Director 216-987-3030
  Cuyahoga Community College, OH

- **Pennsylvania Blue Shield's Job-Linked Skills Program**
  Contact: Institute for the Study of Adult Literacy 814-863-3777

- **Print Industry Workers**
  Contact: Laura Weidner, Project Director 410-455-4501
  Catonsville Community College, MD

- **SCORE: Sales and Customer Service Occupational Readiness Education (Computer-Based and Classroom Instruction)**
  Contact: Institute for the Study of Adult Literacy 814-863-3777

- **TQM for Manufacturing**
  Contact: Linda Mrowicki, Project Director 708-803-3535
  Adult Learning Resource Center, IL

- **Eric Documents with Sample Workplace Literacy Curricula**
  ED # 353389, # 355356, # 326080, # 329132, #311152, #359834

- **National Workplace Literacy Program Abstracts**
  Contact: U. S. Department of Education, Office of Vocational and Adult Education 202-205-9872

Selected Work-Related Computer-Based Commercial Materials

- **A Day in the Life...**(Job-related assessment and instructional software)
  Contact: 800-225-0248

- **ExpressTrain (Desktop** authoring system to develop computer-based training modules)
  Contact: 609-737-8098

- **Interactive Knowledge** (Products include CD-ROM courseware for textile industry)
  Contact: 800-344-1502

- **PDQ: Building Skills for Using Print** (Multimedia instructional program using real-world problems and examples to teach prose, document, and quantitative literacy)
  Contact: ETS Literacy Learning and Assessment Group 800-551-1230

- **Work Keys System** (National system for teaching and assessing workplace skills)
  Contact: 800-WORKKEY

Selected Work-Related Print-Based Commercial Materials

- **Gender and Diversity in the Workplace** (Exercises to help workers gain an understanding of how gender and diversity issues may be dealt with sensitively and professionally. Includes: individual activities, group and class activities, diagnostic instruments, role plays, case studies and simulations.
  Contact: Sage Publishing 805-499-0721

- **Essential Skills for the Workplace** (Series of four books–two at level one and two at level two–that develops literacy and problem solving skills needed in the workplace and in everyday life)
  Contact: Contemporary Books 312-540-4500

- **GOALS: Glencoe Occupational Learning Series** (Develops literacy and "learning-how-to-learn" skills in work-related contexts; includes a *Knowledge Base* and a *Skills* book for each context)
  Contact: Glencoe: Macmillan/McGraw-Hill 800-848-1567

- **Workplace Dynamics** (Notebook of role playing and work-related simulations to build literacy skills, problem-solving, and interpersonal skills needed in the wokrplace. Includes materials, teaching guide, suggested activities)
  Contact: New Readers Press 800-448-8878

Selected Pennsylvania 353 Workplace Projects

Contact: AdvancE 800-992-2283 or WPALRC 800-446-5607

- **ABE Pre-Vocational (Clerical) Skills Training (AE #2175-176)**

This project provides a model curriculum for pre-clerical training. Students gain competencies in Math, English, and office skills as they advance from Receptionist to Secretary to the President of a fictitious shampoo company.

- **Bilingual Career Exploration Workshop (AE #3025-198)**

Project produced a Handbook on career investigation & job search techniques for bilingual adults including a Spanish version of Holland's *Self-Directed Search Guide*. Bibliography of bilingual vocational counseling centers in the US.

- **Demonstration Mentoring Service (AE #3025-324)**

Project matched unemployed "trainees" with mentor-volunteers in service areas. Final report stresses what went right and wrong with this individualized approach and corrections made. Bottom line: a higher % of trainees were hired at higher wages.

- **Gearing Up for the Future (AE #3025-626)**

Linkage project between Northampton Community College and local businesses to develop a basic math numeracy skill training audit and curriculum which includes a 250-page competency-based math manual. Teaching strategies are included.

Resources

- **Learning for Earning (AE #3025-638)**

The content focuses on women workers and features role playing to learn appropriate behavior in difficult work situations. It encourages student to think critically in order to assess their own interests, skills and work behavior.

- **Mary' Story: A Curriculum for Teaching Health Care Vocabulary (PA #2020)**

Developed by the Institute for the Study of Adult Literacy, this curriculum teaches medical terminology in a narrative format in which the main character models how to identify medical words by breaking them into their component parts. Curriculum also includes a full range of instructional activities to reinforce each chapter.

- **Menu Selection Assistance- A Workplace Literacy Curriculum for Hospital Workers (PA #98-3032)**

The purpose of this project was to develop, test, and publish a workplace literacy curriculum for hospital workers who assist patients in completing their daily menu selections. The hospital's education division determined that many entry level employees could improve their job performance if certain basic skills were improved.

- **Moving the Worker into the Classroom (AE #3025-626)**

Northampton Community College published a 24-page guide for companies and literacy programs to set up workplace instruction. Includes 11 brief guidelines for selecting an effective literacy teacher.

- **Printing and Literacy Project (PA #98-1030)**

Developed and implemented a job-related literacy curriculum to support a printing trades training program; piloted with west Philadelphia residents who had some mechanical skills and a strong interest in developing them into technical competency in the printing field.

- **Project GATP: General Aptitude Test Preparation (PA #98-1028)**

The Development Center for Adults developed this curricula for unemployed or under-employed adult learners who wish to prepare for the verbal and numerical areas of the GATP employability-screening aptitude test.

- **Project Prepare (AE #3025-536)**

3 self-instructional packets similar to GED workbooks were developed to give learners a competitive edge when taking entrance exams for vocational training programs for Licensed Practical Nursing, Business & Veterinarian Assistant.

- **Sewing the Seeds: Literacy in a Clothing Factory (AE #3025-578)**

This project established a workplace program in a Philadelphia sewing factory and developed an ESL curriculum to suit employee, union and management objectives. Set of four units with 26 lesson plans and instructional materials is included.

- **Reading, Writing, and Critical Thinking for Employees (AE #3025-716)**

The Allentown Literacy Council developed a specific skills curriculum applicable to workers at entry and second level in light machinery, health care, food preparation, hotel and housekeeping businesses. It teaches basic skills at 0-4 and 5-8 levels using real and workplace-simulated materials developed in conjunction with representatives from local businesses.

- **Statistical Process Control: A Manual for Workforce Educators (PA #99-2006)**
This project prepared a 56 page manual that is designed to be used in conjunction with commercially available SPC manuals. It contains an overview of SPC, review of basic statistical terms, basic calculations and graphs, sample pre-post tests, glossary, and definitions of symbols.

- **TNT: Teams Need Training (PA #99-4007)**
CIU#10 in Lock Haven, PA developed this curriculum for adult educators to use in teaching team work skills. The manual provides an excellent discussion of team development and eight chapters addressing conflict resolution, problem solving, leadership, motivation, self-esteem, communication, decision making, and interpersonal relations.

- **Upgrading Basic Skills for the Workplace (AE #2175-189)**
This comprehensive guide to developing a workplace literacy program accompanies a 30-minute video depicting workplace literacy programs in eight sites in Appalachia. The manual provides useful information on instructional design, use of computers to teach basic skills, and market and evaluation strategies for workplace literacy services.

- **Worker-Centered Learning: Basic Skills Curriculum in a Union Setting (PA #98-4013)**
The Institute for the Study of Adult Literacy, in cooperation with District 1199c Philadelphia Hospital and Health Care Workers Union, developed the curriculum that includes concept-building, writing, math, and critical reading activities for union materials such as pension plans, health care benefits, and the union contract.

- **Workforce Basics (PA #98-4008)**
Center for Literacy (CFL) staff designed and developed this curriculum that addresses needs common to diverse worksites. The student and instructor materials use general workplace-related materials, such as memos, handbooks, insurance policies, etc. to provide instruction in critical reading, effective writing, oral communication, problem solving, study skills, math, and word processing. Manuals include suggestions for adapting the instructional activities to job-specific tasks.

- **Workforce Literacy for the Hearing Impaired (AE #3025-669)**
Project provided workforce literacy support services for thirty hearing-impaired adults as part of a job placement program. Of special interest is the communications course delivered to HI employees, co-workers, employers and other community members.

- **Workplace Education: Special Topics (PA #98-2026)**
The project was designed to respond to requests from employees for workshops on specific areas, such as stress management, communication skills, diversity in the workplace, assertiveness, job success and computer literacy.

- **Workplace Literacy Self-Test (PA #98-4017)**
The Northampton Community College developed an employee self-test of reading and math skills entitled, *Point Yourself in the Right Direction*; a guide for employers that provides ideas for distributing the test, and a final report of the project.

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Workplace Literacy Resource Person Database
FAX-BACK FORM

FAX To: Priscilla Carman
Institute for the Study of Adult Literacy
814-863-6108

From: Name:_____
Title:_____
Organization:_____
Address:_____
_____
Phone No._____Fax No._____

Please add or change this entry in the resource person database:

Name:_____
Title: _____
Organization:_____
Address:_____
_____
Phone No._____
Areas of Expertise:_____

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Penn State University
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WorkNet *Trainer's Guide* Feedback
FAX-BACK FORM

FAX To: Priscilla Carman
Institute for the Study of Adult Literacy
814-863-6108

From: Name:_____
Title:_____
Organization:_____
Address:_____
_____
Phone No._____Fax No._____

The *WorkNet* project staff would like to hear your comments or suggestions about this *Trainer's Guide*. Please provide the relevant information below, such as the details of any resource, activity, or training tip you would like to see added or changed and why.

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